$1.50 a copy; $57 a year

© Entire contents copyright 1986 by Crain Communications Inc. All rights reserved.

C2710-1

December 8, 1986

Special Report: 100 Top Markets

Advertising Age®

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

Turning the corner

Future brightens for net tv, magazines

By VERNE GAY

NEW YORK—Major media—particularly the Big 3 tv networks and consumer magazines—may once again be on the brink of a significant growth year.

After a year of declining ad revenues and nagging doubts about the future, several signs now point to renewed optimism in both net tv and magazines. As the bedrock media for most national advertisers, these are the businesses that suffered the most during the latest slowdown in ad spending.

The change appeared suddenly last week.

In tv, a strong network scatter market emerged—as it traditionally does after the Thanksgiving holiday—when more than 50 advertisers reportedly began shopping for $150 million in first-quarter inventory alone.

What makes this new buying activity especially noteworthy is the way buyers are approaching the market. Last week about a dozen advertisers—including

(Continued on Page 76)

Retailers put restrictions on Discover

By LAURIE FREEMAN and PATRICIA STRNAD

Sears, Roebuck & Co.'s all-out effort to convince other retailers to accept its Discover Card is running into trouble during this vital Christmas shopping season.

While Sears is spending heavily to promote the year-old card, rival credit card issuers are responding to the challenge, the threat of federal restrictions has been raised and some of Sears' targets among the retailing community are wary about how Sears handles Discover-generated customer data.

"This season marks a major turning point [for the Discover Card]," said a retailing industry source. "If Sears doesn't make a major breakthrough this Christmas season, their credibility is going to be hurt."

Analysts credit Sears with quickly building an impressive base, with 8 million consumers now carrying the card and 480,000 outlets honoring it. San Mateo, Cal.-based Visa International has 93 million cards in circulation, topping New York-based MasterCard International (72.4 mil-

(Continued on Page 79)

Illustration by Susan Wise

Unilever deal triggers Amer. Brands search

By PAT SLOAN and NANCY GIGES

Rebuffed by Chesebrough-Pond's, which turned to giant Unilever as a white knight, American Brands is still after a major acquisition, sources say, and Gillette Co. may be among the candidates.

Reports that American Brands was interested in the Boston-based toiletries marketer, which only two weeks ago successfully fended off an unwelcome bid from Revlon Group (at a cost of $558 million), surfaced as Gillette's stock jumped $6.75 in heavy trading Dec. 4. Hanson Trust PLC, a British company, was also rumored to be interested in Gillette.

Gillette declined to comment on rumors and recurrent reports that it's considering selling 20% of its stock to Ralston Purina Co. It also had no comment on reports that in the wake of the Revlon attack it had approached Colgate-Palmolive about a possible merger.

Gillette wasn't the only company not talking. In a churning mergers and acquisitions market, American Brands would neither confirm nor deny its interest in Gillette.

Also, reports resurfaced that Revlon chairman Ronald Perelman was interested in American

(Continued on Page 78)

Last Minute News

Merrill Lynch snares January 'Fortune'

NEW YORK—Merrill Lynch has purchased one of the two January issues of *Fortune*. A *Fortune* spokesman said he believes it's the first time a single advertiser has bought an entire regular issue. The issue will introduce the new *Fortune* 50 annual list of most exciting business people. Bozell, Jacobs, Kenyon & Eckhardt handles Merrill Lynch.

Coca-Cola crafts 'message of hope'

ATLANTA—Coca-Cola Co. soon will break internationally

(Continued on Page 8)

NEWSPAPER
WASHINGTON DC 20014
4520 EAST-WEST HWY #800
SRI ACQUISITIONS
CONGRESSIONAL INFO SERVICE
CONGLI AA 86699 99 NNA
*****5-DIGIT 20014

Highlights

Media picture brightens 1
Major media—particularly the Big 3 tv networks and consumer magazines—may once again be on the brink of a significant growth year.

Sears discovers obstacles 1
Sears, Roebuck & Co.'s all-out effort to convince other retailers to accept its Discover Card is running into trouble during this vital Christmas shopping season. While Sears is spending heavily to promote the year-old card, rival credit card issuers are responding to the challenge, and the threat of federal restrictions has been raised.

Ship comes in at Lands' End 4
Lands' End has remained hidden from public scrutiny, but the direct-mail outfitter, founded by former Young & Rubicam copywriter Gary Comer, went public in October and opened its books for the first time. The company's success, including a 9.5% profit margin, startled even veteran catalog retailers.

Shandwick buys U.S. shop 6
The U.K.'s Shandwick public relations group is moving to grab a share of the U.S. and global pr markets in the latest example of foreign communications companies moving aggressively into the U.S. Shandwick, the U.K.'s largest pr agency, last week purchased Henry J. Kaufman & Associates, a 57-year-old Washington advertising and pr agency.

Quaker loves those Tender Chops 24
Quaker Oats Co. is replacing its slumping Ken-L Ration Love-Me-Tender Chunks dry dog food with Tender Chops. It plans to back the new, dual-texture pet food with a $25 million advertising effort.

Griffin Bacal rallies to Commodore 59
Griffin Bacal's challenge will be to convince consumers and Wall Street that Commodore International Ltd. has turned the corner on financial stability when the agency takes over the troubled computer marketer's account Jan. 1.

SAGE vision for Europe 67
Ogilvy Group's new SAGE Group marketing consulting business is coming to Europe in January. SAGE, launched in the U.S. in September, is a marketing consulting business focusing on product movement at the retail level.

FEATURES

McNuggets of a success story 41
In an excerpt from "McDonald's: Behind the Arches," author John F. Love explains how McDonald's tries to avoid wasted resources and multiple advertising messages by bringing the local advertising agencies into corporate planning. Twice each year, McDonald's meets with principals at all 65 agencies and with members of the Operators National Advertising Fund committee to thrash out new marketing plans and review current ones.

INTERNATIONAL

Lintas, Hakuhodo explore stronger ties 52
SC&B:Lintas, part of the Interpublic Group of Cos., and Hakuhodo International, Japan's second-largest agency, are looking for new ways to strengthen their relationship. They work together worldwide by stationing representatives from each agency in the other's office, but now are looking at a joint venture similar to DYR, the joint venture of Young & Rubicam and Hakuhodo's rival, Dentsu.

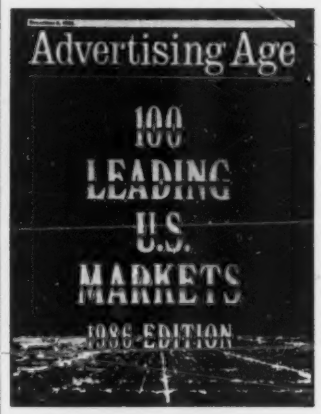
OTHER NEWS

The yearlong price war between producers of Sunday newspaper freestanding inserts may be nearing an end as the result of two developments: Valassis Inserts, the leading producer, changed hands last week, and Product Movers, the industry's No. 2, made an unsolicited tender offer for No. 3 Quad Marketing. Page 3.

The successful simultaneous release of a Spanish-language version of the animated feature film "An American Tail" could change the way Hollywood markets some of its movies. Page 12.

Ski resorts are plowing into segmented marketing to corral everyone from children to businessmen. With national skier days remaining constant at about 52 million per season, resorts must fight to increase market share. Page 56.

Despite their high price tags electronic toys appear to be replacing fantasy items as hot sellers this Christmas. Care Bears, Rainbow Brite, Masters of the Universe and GoBots—best sellers of Christmases past—appear to face impending doom as toy marketers become technology-driven. Page 65.



ADVERTISING AGE profiles the nation's 100 leading markets based on U.S. Census population and provides a sense of each one's character, media and market competition, top businesses, unemployment rates, consumer habits and plans for economic growth.

SPECIAL REPORT

Special Report will return Dec. 15 when it focuses on Healthcare Marketing.

REGULAR FEATURES

ADVERTISER PEOPLE 63
ADVERTISING MARKETPLACE 71
ADWHIRL 73
AGENCY PEOPLE 32
BACK PAGES 54
BOB GARFIELD'S AMERICA 45
BRADY 46
BRADY'S BUNCH 54
CON-SID-ERATIONS 17
CONTRACT SPORTS 28
CORPORATE CLOSEUP 4
CORRECTIONS & CLARIFICATIONS 6
CURRENTS 48
DIRECT AND PROMOTIONAL MARKETING 58
EDITORIAL 17
FOR THE RECORD 75
FORUM 18
LETTERS 20
MEDIAWORKS 60, 62
OBITUARIES 51, 80
PARTING SHOT 50
PHOTO REVIEW 64
PRESSTIME 6
REGIONAL NEWS 56
STREET TALK 74
T.N.T., THE NEXT TREND 45
U.S. NEWSWATCH 4
VIDEOTECH UPDATE 58
WORDS 46
WORLD NEWS ROUNDUP 3

FIGURES TO FILE

NEWSPAPER AD INCHES, SEPT. '86 66

Vol. 57, No. 61—ADVERTISING AGE (ISSN 0001-8899) is published weekly except semiweekly the fourth week in March and the first week in September at 740 Rush Street, Chicago, Ill. 60611-2591. Second-class postage paid at Chicago and additional mailing offices. Send address changes to ADVERTISING AGE, Circulation Department, 965 E. Jefferson, Detroit, Mich. 48207. Microfilm copies are available from University Microfilms, 300 N. Zeeb Rd., Ann Arbor, Mich. 48103. Microfiche copies are available from Bell & Howell, Micro Photo Division, Old Mansfield Rd., Wooster, O. 44691. $1.50 a copy, $57 a year, $104 two years. Add $89 per year for air delivery to Europe & Middle East. Add $34 for surface mail to all other foreign countries. WILLIAM STRONG, vp-circulation; JOHN HUFFMAN, fulfillment director; DAVE KELLEY, circulation manager. Four weeks' notice required for change of address. Address all subscription correspondence to Circulation Department, Advertising Age, 965 E. Jefferson, Detroit, Mich. 48207 (313) 446-0494.

CBS braces to hold line in Super Bowl

By ROBERT RAISSMAN and LARRY G. COLLINS

NEW YORK—CBS-TV is trying to hold firm on its $600,000 per 30-second rate in the Jan. 25 Super Bowl, but sources say so far at least 17 of last January's advertisers will not be participating in the football championship.

CBS-TV vp-sales Jerome Dominus denied reports that the Super Bowl and its pregame and postgame shows remained only 60% sold out just six weeks before kickoff. Last year, NBC had a Super Bowl sellout before December.

Mr. Dominus said CBS' sellout status was "much higher" than 60%, but he declined to be specific.

He also denied widespread reports that CBS was offering packages that include the game and the warmup and postgame shows, with an average 30-second unit costing $550,000.

Some buyers also had said CBS was offering packages that included National Football League playoff games. Mr. Dominus conceded that "there may be some [price] shaving" on the pregame show.

Agency buyers doubt that CBS is close to a sellout, especially since the usually heavy automotive and beer sponsorships have not materialized.

Chrysler Corp.'s Dodge division and American Honda Motor Co. reportedly have each purchased a single 30-second spot in the game, but the car category usually covers four-to-six Super Bowl minutes.

In the beer category, Anheuser-Busch has bought two minutes in

(Continued on Page 78)

Saatchi touts year's growth

By STEWART ALTER

Saatchi & Saatchi Co., in its first official statement concerning client conflict fallout, ran a newspaper ad last week acknowledging it lost $400 million in billings after its acquisition of Ted Bates Worldwide earlier this year.

But Saatchi said its losses were more than made up, with many of the gains coming from the same clients that earlier withdrew business.

In its two-page newspaper ad, which appeared Dec. 5, London-based S&S said: "Though the total value of business transferred, almost $400 million, has produced a number of gory headlines, it represents only around 5% of total group billings, and has been more than compensated for by over $400 million of new business gained within the group in the same period, including major assignments from Procter & Gamble, RJR Nabisco, Xerox, Mars and Renault."

P&G, RJR Nabisco and Mars were among the major clients that withdrew business from Saatchi units as a result of acquisitions.

The ad, which appeared in the *New York Times* and *Wall Street Journal*, basically presented the results of Saatchi's fiscal year ended Sept. 30. Pretax profits rose 73% to $103 million in the period, during which it acquired Dancer Fitzgerald Sample, Backer & Spielvogel and Bates.

The full financial results, released the previous day, reported that revenue rose 47.2% to $652.7 million and net income rose 64.8%

(Continued on Page 79)

West Coast News

BJK&E keeps hold on Alpha Beta account

LA HABRA, CAL.—American Stores' Alpha Beta division has renewed three-year incumbent Bozell, Jacobs, Kenyon & Eckhardt, Los Angeles, as agency for its $14 million broadcast account. Separately, Von's Grocery Co., El Monte, has given Keye/Donna/Pearlstein, Los Angeles, the account for its newly formed Pavilions "superstore" grocery division. That agency already handles Von's Jerseymaid dairy unit. The appointment follows rumors that Grey Advertising's hold on the $10 million-to-$15 million Von's general-market broadcast account may be shaky. Earlier, Von's reviewed agencies, including K/D/P, but eventually reappointed Grey (AA, March 24).

LOS ANGELES—**Asher/Gould** has let go vp-media services Lou Podover after less than six months in the post.

SAN JOSE, CAL.—**Altos Computer Systems** has added two more agencies to the review of its $2 million account, currently unassigned. Pinne, Garvin, Herbers & Hock and Transphere International, both San Francisco, join seven others vying for the business (AA, Nov. 17). Brooke Battles, former director of marketing at Mountain View-based Activision, has been named director of marketing and communications at Altos, succeeding Beth Hornthal, who left mid-review to become a consultant.

SAN FRANCISCO—Incumbent agency **Lowe Marschalk** has pulled out of the review for the estimated $2 million New Zealand Kiwi Fruit Authority account. Goodby, Berlin & Silverstein also has dropped out. Mojo MDA-Allen & Dorward remains one of the contenders.

December 8, 1986

Advertising Age

Crain's International Newspaper of Marketing

Entire contents copyright 1986 by Crain Communications Inc. All rights reserved

100 LEADING U.S. MARKETS

1986 EDITION

100 Markets diversify for growth

Los Angeles narrows leadership gap with New York; population shifts to sunnier climes but so does unemployment

Copyright ©1986 by Crain Communications Inc. Quotation or reproduction in whole or in part without written permission is expressly prohibited.

By R. CRAIG ENDICOTT

The thing about fads, even industrial ones, is that they fade away. Today San Joseans are down on their chips in the depressed Silicon Valley. Yesterday, the big smokestack industries of the Midwest were rolling steel for worldwide distribution only to lose a good part of that market.

This churn effect defining industrial turnover is a dominant theme in Advertising Age's triannual 100 Leading Markets issue. Some of the patina has come off the rust belt, while a few Sunbelt markets have proven anything but an the elixir to the jobless, or the seeker of a more laid back lifestyle. Crude oil may have lost its Midas touch, but markets that rely on it are sure to bask in its fortunes again.

The population churn—the exodus from the Midwest to the South, southwest and Pacific coast—has meant lower unemployment in those vacated areas in general. It also has meant jobless rates in three of the five Sunbelt markets higher than the Midwest's 7.3%. Of the 13 cities in this issue with negative growth in population between 1980 and 1985, 12 are in the upper Midwest.

The 100 list, which is based on U.S. Census population totals, is led by New York with 8.5 million people, up 2.3% from 1980. But Los Angeles-Long Beach is closing fast with 8.1 million, up 8.4%. It has made up half the distance that it trailed New York in the last Ad Age 100 leading markets issue in 1983. Chicago is a distant No. 3 with 6.2 million, up 1.9%. LA-Long Beach, however, is $12 billion ahead of the other two in total retail sales with $49.9 billion in 1985, up 26.3% from 1982, according to data supplied by Marketing Economics Institute, which also ranks LA-Long Beach No. 1 in growth in disposable income among the 100.

Absent this issue are the Michigan MSAs of Saginaw-Bay City-Midland and Lansing-East Lansing. Represented as a single market for the first time is Kansas City, Missouri and Kansas, leaving three vacancies that were filled by Bakersfield, Cal. (No. 91), Columbia, S.C. (No. 97) and Wichita (No. 98), with population growth rates of 19.3%, 7.2% and 5.7%, respectively. Bakersfield, in fact, is ranked No. 8 among the 100 in population growth behind No. 1 Austin, Tex., which recorded a 29.6% growth from 1980.

Markets in which certain industries have become dominant are beginning to confront the churn factor sooner than later. Their antidotes to reliance on oil, computers, hi-tech, rubber, textiles, etc., include several options: Diversification—generally another expression for white collar, service sector jobs; loans to lure retailers downtown; regional growth planning that supplants the helter skelter of home rule; business consortiums selling a city's strengths; and advertising campaigns designed as much to generate local enthusiasm as to attract outsiders.

Houston is facing its worst crisis since Sam Houston won the big one at Buffalo Bayou on the San Jacinto east of town. While the issue was independence from Mexico then, it is oil now. A Houston sociologist's description of the city's problems as a "weeding out process" seems pretty much on target. That process is thinning out the more marginal players in the petrochemicals industry in a city growing increasingly service-minded. Pittsburgh has rebounded from its depression in much the same way. Antiquated mills have been shut and 80% of new jobs—usually white collar—are created by employers with less than 20 workers.

Houston's large service-sector economy has helped hold down unemployment to 10.5% in September, while the big petrochemical centers surrounding it have jobless rates reaching 14.2% (Beaumont-Port Arthur). Houston is rallying local citizenry through the "Houston Proud" ad campaign.

"Crisis-management" has been prevalent in the big markets of neighboring Louisiana where the state once thought its oil-driven economy recession-proof. New Orleans, where unemployment is 10.8%, is trying to offset a $30 million budget deficit. It laid off workers this year and then reduced salaries by cutting the work week among other employes to four days. Now the city is considering assessing a 1.5% earnings tax on salaries above $5,000 for all employed within the city.

The ripple effect of the drop in oil prices from $30 to $10 a barrel has been devastating to Louisiana's capital city, Baton Rouge. A state deficit estimated as high as $500 million has forced the state to trim the payroll by giving workers an extra two days off per month without pay—and 20,000 of those workers live in Baton Rouge. Local sales-tax receipts continue to drop precipitously since they fell 9% in 1984 from 1983. Another $10 million budget shortfall is anticipated for 1987. Only Houston leads Baton Rouge in the rate of increase in bankruptcies among the top markets.

Denver, a big oil and gas center, suffers from downtown vacancy of 29.3%, one of the highest in the nation (18.3% is average). Houston, too, is overbuilt. Multi-family housing is 18%-20% vacant, office space, 26% vacant, and hotel occupancy, 68.2% in 1981, has dropped to 46.8% for the first nine months of this year.

Hi-tech, one of the hot industries cities are searching out, is not everyone's answer. Just ask the many San Jose residents facing a mortgage on their $143,000 (median price there) ranch-style homes who are laid off of work from their Silicon Valley computer jobs. Real estate officials there accuse many desperate landlords of "robbing from next year's market" by offering to pay off a company's current lease if it becomes their tenant.

(Continued on Page S-4)

RANK **17**

Anaheim-Santa Ana, Cal.

Tomorrowland

($ in thousands)

1985 vital statistics

Population	2,122,700
Disposable income	$34,644,916

The "Big Orange" and "Orange Riviera" are just a couple of the sobriquets Southern California boosters have used to describe burgeoning Orange County. Some, calling up the obvious Disneyland connection in this Anaheim-Santa Ana MSA, have dubbed it "Tomorrowland . . . Today," still others, facing its horrendous traffic jams daily, curse it as a commuter's nightmare.

Orange County, which fronts 42 miles of coast between Los Angeles and San Diego counties, has emerged as Southern California's richest market. By any measure, it's also one of the most important markets in the nation. In buying power, its 2.1 million residents command an annual disposable income pegged at $31 billion. Effective buying income per household is $41,819, compared with $34,782 for neighboring Los Angeles County and the $35,666 average for the state.

Orange County's agricultural economy is a thing of the past, but the county still is dubbed the amusement park capital of the world. It was home to John Wayne, who has been memorialized by John Wayne Airport, serviced by 11 major airlines and 79 flights a day. The busy airport will not be able to handle the numbers of passengers projected for the years ahead, and points up the county's need for an overhauled transportation system.

This affluent marketplace is served by an abundance of media, allowing advertisers to choose from 13 tv stations, cable tv systems, 60 radio stations, 20 magazines, nine daily newspapers and 32 weeklies. No newspaper blankets the 750,000 households in Orange County, but the *Orange County Register* (circ. 288,927 daily and 325,650 Sunday in the county as of Sept. 30, 1986) reaches more than any other.

Santa Ana-based *Register* is the flagship of the 32-paper Freedom Newspapers chain. In recent years the paper has been transformed into an aggressive daily, creating what may be the best full-color reproduction in the nation. It competes effectively against the *Los Angeles Times*, which offers an Orange County edition with a weekday circulation of 163,315 and 207,504 on Sunday. The *Times* offers a $24.87 cpm daily for a full-page compared with a cpm of $18.85 daily for the *Register*.

Explosive growth and new wealth have brought more problems than monumental traffic jams. Middle class housing is scarce and land and home prices are high. Cost of a three-bedroom house in Newport Beach is more than $300,000. The median price of a home as of this past spring was $142,856 countywide. With 50% of the county population earning less than the $43,841 median family income, many families can't afford to buy.

Many lay blame for high housing costs on the concentration of land in the hands of a few developers such as the Irvine Co. Developers, however, say housing is expensive because of the price of land and county building fees, costs that are forcing them to seek developmental properties outside the county.

Whatever the case, first-time homebuyers can expect to invest at least $120,000 for a modest new single-family home in Orange County, compared with a cost of $70,000 to $80,000 for a comparable unit in San Bernardino.

Incorporated in 1876 and currently home for some 237,500 inhabitants, Anaheim is Orange County's largest and oldest city and accounts for about 30% of the county's population. Four freeways converge on the city and two more pass nearby. Close proximity to Los Angeles and the Irvine/Newport Beach area makes the city a strategically located, business center. Commonly regarded as a host to tourists and conventioneers, the city is also the No. 1 employer in Orange County. Anaheim has achieved a balance between the entertainment industry, the professional sports community and the industrial community represented by "blue-ribbon companies." Disneyland is the city's third-largest employer with 3,500.

Santa Ana, Orange County's diverse and cosmopolitan county seat, is the market's only true urban city and currently is undergoing large-scale redevelopment with attendant political turmoil. A population of 225,000 is distributed over an area of some 27.2 sq. miles, not including a conservative estimate by the Immigration & Naturalization Services of an additional 40,000 undocumented Hispanic residents. Statistics show whites and Hispanics each account for 44.5% of the total population.

Main Place, under construction on 60 acres at Main and the Santa Ana Freeway, is the largest redevelopment project in the city. A cooperative venture between Henry Segerstrom and

Geographic spread of the nation's

JMB/Federated Realty Associates Ltd., Main Place is a 400,000-sq.-ft. retail complex anchored by Bullocks, Nordstrom and Robinson department stores.

More than 10,000 Santa Ana employers provide 130,000 jobs, with only 11 of the companies employing more than 1,000. The city is national or divisional headquarters for such companies as ITT, Canon, Cherry-Textron, Lear Siegler, Emerson Electric, Philips, Rockwell International and Xerox.

RANK **10**

Atlanta, Ga.

Hotlanta

($ in thousands)

1985 vital statistics

Population	2,471,700
Disposable income	$32,367,246

The one-line joke first appeared in a 1938 newspaper column as a comment on the enormous amount of train traffic through Atlanta. But that was before commercial aviation became a $1 billion-a-year industry in Atlanta. Now, everyone who has ever landed at Hartsfield International Airport knows: "If you die in the South, it doesn't make any difference whether you're going to heaven or hell—you have to change planes in Atlanta."

Behind the joke is the unassailable fact that Atlanta continues to grow as the transportation and communications hub of the Southeast.

Delta Air Lines has its headquarters in Atlanta and Eastern Airlines, which has been acquired by Texas Air, has a major hub and jet maintenance base here. Last year, 21.6 million passengers enplaned at Hartsfield, making the airport the second busiest in the world to Chicago's O'Hare. By the end of this year, Hartsfield expects to load 22.5 million.

Many of those passengers had come to Atlanta for conventions. In 1984, the city played host to 1.1 million conventioneers who spent an estimated $469.5 million. Last year, that grew to 1.5 million spending $634.5 million.

More than 35,000 people work at the airport. Delta is the largest non-government employer, followed by Lockheed-Georgia, General Motors Corp., Bell South/Southern Bell Telephone & Telegraph Co. and Rich's Inc.

The city has become a communications and technology hub. In addition to Ted Turner's Superstation WTBS, Cable News Network and CNN Headline News, Atlanta and suburban Gwinnett County are incubating a hi-tech community which includes Scientific Atlanta, maker of satellite systems, Hayes Microcomputer Products, a producer of modems, and Digital Communications Associates.

Atlanta, whose retail market grew 13.7% from 1984 to 1985, is ranked 10th in the country in total retail sales, notes a study by the New York-based Buying Power Data Service. Retail wage and salaried employment represent 18% of the city's work force.

Adding to the Atlanta retail growth is a full-scale invasion by Minneapolis-based Dayton-Hudson Corp. Since September, 1985, D-H has opened four Branden's housewares, linens and home accessories stores, five new Mervyn's apparel and soft goods home furnishings stores and four Lechmere electronics and appliance stores. Until last year, D-H's only presence in Atlanta had been 11 B. Dalton Bookseller stores—most in suburban malls.

The biggest growth area in Atlanta is commercial real estate. In July 1986, non-residential building permits were running at an annualized rate of $1.418 billion, up 4% from 1985. Atlanta's commercial building is nearly equal to all of the commercial construction in the states of Alabama, Louisiana and Mississippi combined.

As a result of Atlanta's commercial building boom, the major action in Atlanta's media has been in the business press. In September, 1985, *Georgia Trend*, owned by St. Petersburg, Fla.-based Times Publishing, began monthly publication. *Georgia Trend* challenged the established monthly *Business Atlanta*, published by Atlanta-based Communications Channels and the weekly tabloid *Atlanta Business Chronicle*, sold in November by Scripps Howard Newspaper Alliance to American Cities Business Journals. All three publications have had a banner year in 1986.

In Atlanta's static daily newspaper market, the *Atlanta Constitution*, published mornings, and the afternoon *Atlanta Journal*, are both owned by Atlanta-based Cox Enterprises and have continued for several years to hover at a combined daily circulation of about 400,000.

The tv market, however, is in ferment. In 1980, Cox-owned WSB-TV, which dominated the market since the day it signed on in 1948, changed network affiliation from NBC to ABC. Longtime ratings loser WXIA, which had been the ABC affiliate in Atlanta, was stuck with NBC. Now, the move doesn't look so good for WSB. ABC is in decline from the ratings summit, opening the door to both WXIA and CBS-affiliate WAGA. WXIA now claims it has more total daily viewers than either of the other two stations. A.C. Nielsen shows WAGA as No. 1 sign on to sign off during October with a 10 rating, 25 share while WXIA is No. 2, at 9/22, and WSB, at 9/21.

In the 6 p.m. news slot, there is a near dead heat with WAGA leading, followed closely by WSB, WXIA, well

Index to charts

S-4 Population, unemployment and retail statistics
S-14 100 leading markets by retail sales
S-16 Total retail sales by category
S-18 Top 10 retail sales markets
S-22 Top 10 markets in 1985 by index of retail sales to disposable income
S-26 Highest unemployment rates
S-32 Shopping through 100 leading markets
S-34 Lowest unemployment rates
S-36 Top 10 markets by disposable income
S-38 Top 10 markets by median in 1985 disposable income per household
S-42 Top 10 markets by population growth
S-44 10 U.S. markets with largest population loss
S-46 Index to the markets

100 largest markets

100 leading markets

Rank	Market	Population	'85-'80 % chng
1	New York	8,465,800	2.3
2	Los Angeles-Long Beach, Cal.	8,108,700	8.4
3	Chicago	6,176,900	1.9
4	Philadelphia, Pa.-N.J.	4,784,200	1.4
5	Detroit	4,318,600	(3.8)
6	Washington D.C.-Md.-Va.	3,489,500	7.3
7	Houston	3,221,700	17.8
8	Boston	2,831,700	0.9
9	Nassau-Suffolk, N.Y.	2,644,700	1.5
10	Atlanta	2,471,700	15.6
11	St. Louis, Mo.-Ill.	2,412,400	1.5
12	Dallas	2,311,700	18.1
13	Minneapolis-St. Paul, Minn.-Wis.	2,262,400	5.9
14	Baltimore	2,252,800	2.4
15	Pittsburgh	2,142,700	(3.4)
16	San Diego	2,132,700	14.5
17	Anaheim-Santa Ana, Cal.	2,122,700	9.8
18	Oakland, Cal.	1,907,800	8.3
19	Riverside-San Bernardino, Cal.	1,906,700	22.4
20	Newark, N.J.	1,882,200	0.2
21	Tampa-St. Petersburg-Clearwater, Fla.	1,868,700	15.8
22	Cleveland	1,860,000	(2.0)
23	Phoenix, Ariz.	1,846,600	22.4
24	Miami-Hialeah, Fla.	1,753,100	7.8
25	Seattle	1,724,000	7.2
26	Denver	1,614,000	13.0
27	San Francisco	1,576,000	5.9
28	Kansas City, Mo.-Kan.	1,493,900	4.2
29	Cincinnati, O.-Ky.-Ind.	1,412,000	0.8
30	San Jose, Cal.	1,398,500	8.0
31	Milwaukee	1,378,600	(1.3)
32	New Orleans	1,324,400	5.4
33	Bergen-Passaic, N.J.	1,301,000	0.6
34	Norfolk-Virginia Beach-Newport News, Va.	1,289,500	11.1
35	Columbus, O.	1,287,600	3.5
36	Sacramento, Cal.	1,258,200	14.4
37	San Antonio, Tex.	1,235,700	15.3
38	Indianapolis	1,203,100	3.1
39	Fort Worth-Arlington, Tex.	1,199,900	23.3
40	Portland, Ore.	1,146,600	3.7
41	Ft Lauderdale-Hollywood-Pompano Beach, Fla.	1,125,200	10.5
42	Charlotte-Gastonia-Rock Hill, N.C.-S.C.	1,049,000	8.0
43	Salt Lake City-Ogden, Utah	1,024,800	12.6
44	Rochester, N.Y.	982,300	1.1
45	Oklahoma City	975,900	13.3
46	Buffalo	971,400	(4.3)
47	Louisville, Ky-Ind.	964,300	0.8
48	Memphis, Tenn.-Ark.-Miss.	944,700	3.4
49	Dayton-Springfield, O.	931,100	(1.2)
50	Middlesex-Somerset-Hunterdon, N.J.	930,400	5.0
51	Monmouth-Ocean, N.J.	918,000	8.1
52	Nashville, Tenn.	909,700	7.0
53	Birmingham, Ala.	903,800	2.2
54	Greensboro-Winston Salem-High Point, N.C.	892,500	4.8
55	Orlando, Fla.	866,400	23.8
56	Albany-Schenectady-Troy, N.Y.	841,400	0.7
57	Jacksonville, Fla.	823,500	14.0
58	Honolulu	814,600	6.8
59	Richmond-Petersburg, Va.	800,700	5.2
60	Tulsa, Okla.	733,100	11.6
61	Hartford, Conn.	732,100	2.3
62	Scranton-Wilkes Barre, Pa.	723,400	(0.7)
63	West Palm Beach-Boca Raton-Delray Beach, Fla.	723,100	25.4
64	Austin, Tex.	695,500	29.6
65	Syracuse, N.Y.	651,200	1.3
66	Allentown-Bethlehem, Pa.	650,000	2.3
67	Akron, O.	646,200	(2.1)
68	Grand Rapids, Mich.	634,900	5.5
69	Raleigh-Durham-Chapel Hill, N.C.	632,000	12.7
70	Providence, R.I.	630,400	1.9
71	Gary-Hammond, Ind.	621,500	(3.3)
72	Omaha, Neb. Iowa	611,600	4.5
73	Toledo, O.	608,100	(1.4)
74	Oxnard-Ventura, Cal.	600,000	13.4
75	Greenville-Spartanburg-Asheville, N.C.-S.C.	599,600	5.2
76	Knoxville, Tenn.	592,700	4.7
77	Tucson, Ariz.	585,900	10.2
78	Fresno, Cal.	580,000	12.7
79	Harrisburg-Lebanon-Carlisle, Pa.	572,900	3.6
80	Jersey City, N.J.	558,500	0.3
81	Las Vegas, Nev.	556,700	20.2
82	El Paso, Tex.	545,000	13.6
83	Wilmington, Del.-N.J.-Md.	544,200	4.0
84	Baton Rouge, La.	544,000	10.1
85	Tacoma, Wash.	523,500	7.8
86	Springfield, Mass.	517,100	0.4
87	Youngstown-Warren, O.	512,800	(3.5)
88	New Haven-Meriden, Conn.	510,100	1.9
89	Little Rock-North Little Rock, Ark.	498,500	5.1
90	Charleston, S.C.	481,700	11.9
91	Bakersfield, Cal.	480,900	19.3
92	Mobile, Ala.	469,100	5.8
93	Lake County, Ill.	465,300	5.7
94	Albuquerque, N.M.	464,300	10.5
95	Bridgeport-Milford, Conn.	444,100	1.3
96	Johnson City-Kingsport-Bristol, Tenn.-Va.	442,700	2.1
97	Columbia, S.C.	439,400	7.2
98	Wichita, Kan.	435,400	5.7
99	Flint, Mich.	433,900	(3.7)
100	Chattanooga, Tenn.-Ga.	425,600	(0.2)

Source: U.S Department of Commerce, Bureau of the Census

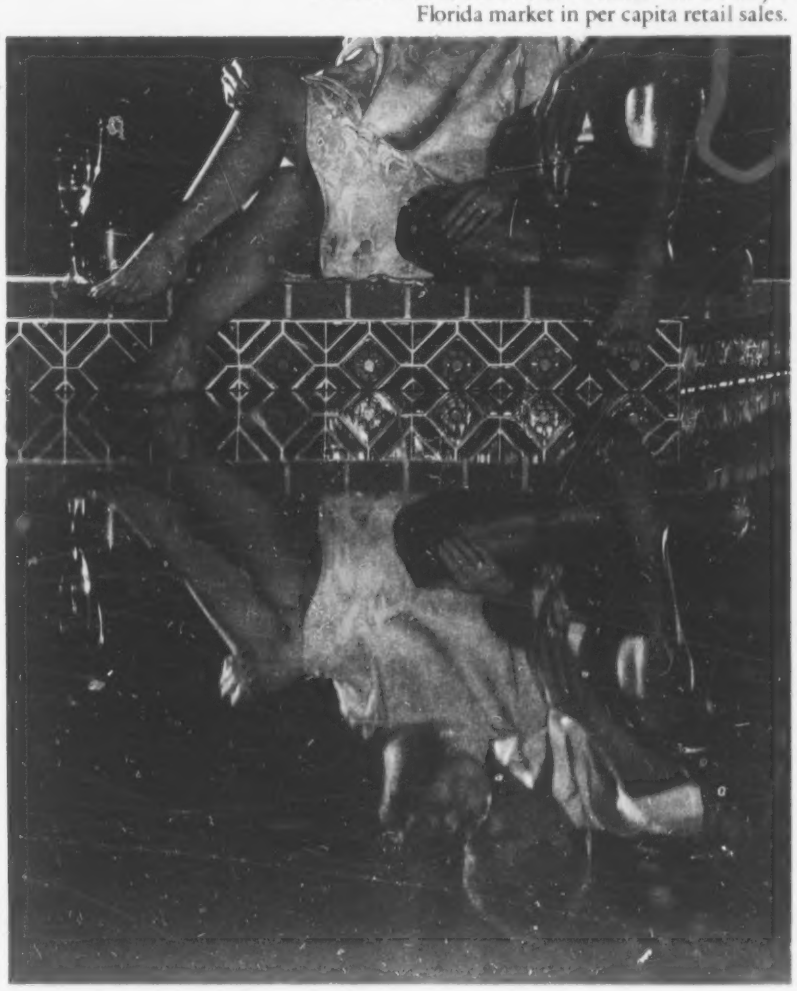
Population, unemployment and retail statistics by region

Region	Population 1985	Population 1982	Labor force 1985	Labor force 1982	Unemployed 1985	Unemployed 1982	Unemployment rate 1985	Unemployment rate 1982	Disposable income 1985	Disposable income 1982	Retail sales 1985	Retail sales 1982
New England	9,798	9,584	6,639	6,373	293	497	4.4	7.8	$114,073	$83,661	$53,057	$39,413
Middle Atlantic	28,764	28,348	17,680	17,131	1,204	1,611	6.8	9.4	395,758	305,038	163,212	127,422
East North Central	31,178	30,939	20,264	20,028	1,787	2,505	8.8	12.5	282,448	219,103	133,412	108,230
West North Central	13,064	12,845	8,860	8,509	549	663	6.1	7.8	95,161	61,738	46,777	31,453
South Atlantic	30,309	28,576	19,405	18,006	1,189	1,572	6.1	8.7	291,327	209,101	147,257	107,606
East South Central	11,154	10,856	6,864	6,577	616	793	9.0	12.1	54,379	42,779	29,866	23,734
West South Central	19,082	18,032	12,660	11,692	996	880	7.9	7.5	164,816	127,928	86,458	67,029
Mountain	9,214	8,578	6,211	5,730	424	501	6.8	8.7	74,837	53,275	40,261	29,304
Pacific	25,979	24,546	17,101	16,181	1,270	1,658	7.4	10.3	366,954	262,636	169,592	131,317
U.S. Total	178,206	172,271	115,461	110,204	8,312	10,678	7.2	9.7	2,825,238	2,163,759	1,377,866	1,075,679

NOTES: Population, labor force, unemployed in thousands, disposable income and retail sales in millions.
The states that comprise each region for the purposes of the Census follow. **New England:** Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.
Source: U.S. Department of Labor, Bureau of Labor Statistics, except disposable income and retail sales from Marketing Economics Institute.

More about Florida's Money Market

Ft. Lauderdale/South Palm Beach is the #1 major Florida market in per capita retail sales.



The News/Sun-Sentinel delivers two out of three readers in Florida's affluent Money Market.

Fort Lauderdale/South Palm Beach
News/Sun-Sentinel
Florida's Money Market

Represented nationally by C.W.O. & O.; Sunday Magazine Network, in Florida by Publishers Representatives of Florida.
The News/Sun-Sentinel is a Tribune Company Newspaper.

100 Markets

(Continued from Page S-2)

A slowdown in the electronics industry nationwide has left 1,300 unemployed in Phoenix, pushing unemployment to 4.8% from a mere 2.8% in 1985. The 3.7% jobless in Minneapolis-St. Paul are largely laid off from Control Data and Honeywell. Boston has over 7,000 jobless electronic's workers that contribute to 4.3% unemployment statewide.

Most markets have developed or organized growth incentives. Wilmington, Del., lured Chase Manhattan, Citicorp, Manufacturers Hanover Trust and J.P. Morgan among 24 financial institutions because of legislation passed five years ago that offered tax breaks and relaxed rules on credit card interest rates. In the process, this created 8,200 more jobs, contributing to Wilmington's low 4.6% unemployment rate and the state's 3.9%.

Newcomer to the 100 list, Wichita, a market with blue-collar strength tied largely to airplane manufacturing, is expecting continued growth through its ability to offer tax exemptions for up to 10 years for certain businesses.

Broad-based growth is being pushed in rapidly developing Middlesex-Somerset-Hunterdon region of central New Jersey. Economists say jurisdictional oversight is needed to replace home rule to foster careful planning without choking off growth in the area, which is rapidly becoming more congested as the New York City sphere of influence fans out. An Indiana Legislature study recommended that the fragmented cities of northwest Indiana (Gary-Hammond area) be incorporated into a single city called Metrolake to enhance development.

The Fort Worth Corp., a private consortium of businessmen, was formed several years ago to help the city shake off its trail dust image. The group launched a $500,000 campaign in 1985 called "Fort Worth, Welcome Home." Columbia, S.C., through a $2.2 million, four-year economic development campaign, "Columbia In Motion," is saying Columbia is no longer a sleepy southern town that flies the Confederate colors. It is a hi-tech area—the 16th fastest employment growth center in nation, according to Chase Econometrics—with only 5% unemployment, and a cosmopolitan southern city that still flies the Johnny Reb above the Capitol.

Harrisburg, Pa., offers an enterprise zone to lure new business downtown. Akron is beckoning retailers downtown by offering $15,000 in matching startup grants under its Main Street Initiative Program. This former rubber capital has launched the Akron Plus Campaign to create 26,000 jobs by 1990, many of those in Polymer Valley between Akron and Cleveland.

Cleveland, speaking of churn, no longer seems the butt of jokes, a dubious distinction it assumed from Philadelphia. Is Houston its successor?#

out of the ratings race for years, is closing the gap.

Stan Petersen, vice president and Atlanta sales manager for A.C. Nielsen, says November is likely to be a three-way tie.

Radio has become as tightly bunched as tv.

Six fms in Atlanta lead the list, with the fight between WPCH, WKLS and WZXI, according to Arbitron's spring sweeps.

Although the Atlanta Flames gave up the distinction of being the only NHL hockey team south of the Mason-Dixon line when the team fled to Calgary, Canada, the Atlanta Braves baseball team and the NFL Atlanta Falcons, have struggled with losing seasons. Only the NBA Atlanta Hawks have made the playoffs in recent years.

RANK **14**

Baltimore, Md.

Charm City

($ in thousands)

1985 vital statistics

Population	2,252,800
Disposable income	$27,157,535

A trip through the Harbor Tunnel on I-95 for someone unfamiliar with Baltimore gives the impression that the city is little more than a decaying smokestack city. At best the appraisal would be only half right.

Baltimore was born a blue-collar town with a strong base in the shipping and steel industries. And as in other parts of the country, there are plant closings and layoffs. Shipping also has become an increasingly competitive industry, and for several years Baltimore took a beating from aggressive southern ports. But the port is very much alive, and getting in shape for a long battle.

A steady growth in the service industries has offset the decline of heavy manufacturing. Unemployment in the city has eased off to 6.4% as of August, and there is only 4.8% unemployment in the metropolitan area.

Last month, William Donald Schaefer ended his 15-year reign as mayor to move into the governor's mansion in Annapolis. During his City Hall tenure, Mayor Schaefer directed a metamorphosis of the downtown area that is held up as a textbook example of urban renewal and managed to have his name painted on virtually every piece of city property from park benches to garbage trucks.

While gentrification is occurring in Baltimore, the big money is still outside the city in horse country. The native Baltimorean still drives a sedan, and most people would rather get their hands dirty with a bushel of steamed crabs than stand at an upscale eatery in Harborplace—the Rouse Co. waterfront retail project built almost a decade ago and which has become the centerpiece of the skyline and ground zero for redevelopment. The Rouse Co. has begun work across the street from Harborplace on the Galleria—an office, 622-room hotel and upscale retail (Brooks Brothers) development.

Within five blocks of Harborplace is a host of other projects that will total some 1 million sq. ft. of office space. Downtown also is slated to get about 400,000 sq. ft. of retail space in the next year.

Some real estate experts began to make noises about overbuilding when the vacancy rate hit double digits earlier this year and kept rising. A recent survey of office space released by the Office Network listed Baltimore's vacancy rate at 16.7% compared with the national average of 18.3%. Area brokers maintain the 16% level was the peak, and the vacancy rate has since backed off to about 12%.

The convention center booked 117 major conventions in 1986, which brought 225,000 delegates to town. That added an estimated $148.6 million to the local economy.

As if a convention center weren't enough to draw people to town, the city also has gone along with several entertainment projects, which some complain are turning the Inner Harbor into another Disneyland.

The National Aquarium is set to expand onto the pier next door with a huge tank for live whale and porpoise shows. Six Flags renovated a former power plant for an indoor entertainment facility that flagged miserably in its first couple of years but may be there to stay after adding a disco to its line-up this summer.

Just as it was a mall that started downtown on its way, a new regional shopping mall has started another boom town northwest of the Baltimore Beltway. Also built by Rouse Co., the Owings Mills Mall provides 320,000 sq. ft. of retail space. Saks Fifth Avenue is the anchor tenant, which is the first time this city has been able to attract that kind of name. The mall is to be connected into the Baltimore subway line through an overland extension from its terminus at Reisterstown Plaza to the southeast. The subway is a sore point for many commuters who get bogged down in traffic on the main north-south artery, Jones Falls Expressway, because the subway cuts diagonally through basically noncommuter territory. Their consternation will be even more pointed as workmen soon descend on the expressway for a massive renovation.

After struggling for years, *News American* finally closed its doors in June, 1986. That made the *Sun* the only major metro daily. But just days after Hearst folded the *News American*, the owners of Baltimore Sunpapers (*Sun*) sold their newspapers, two tv stations and other holdings to Times Mirror Co.

Sunpapers recorded record circulation in September of 440,000 daily and 507,000 Sunday, compared with a 356,000 daily average and 417,000 Sunday for the six months ending Sept. 30, 1985. Local media buyers say that various ad rates have gone up in keeping with the increase in circulation, but there also is a belief that rates will jump substantially at yearend.

Keeping the *Sun* honest are the six-day *Daily Record*, primarily a legal newspaper, and *Baltimore Business Journal*, a local business newsweekly that was part of a six-paper chain recently purchased by American Cities, Kansas City, which also bought 11 Scripps Howard business journals. Plan is to syndicate national ads.

WJZ-TV (ABC) leads the tv charts with an 8.3 rating and 27 share from sign on to sign off, according to A.C. Nielsen's May reports. WBAL (CBS) is second at 7.4/24, and WMAR-TV (NBC), third at 6.9/22.

RANK **33**

Bergen-Passaic, N.J.

Retailers' Eden

($ in thousands)

1985 vital statistics

Population	1,301,000
Disposable income	$20,367,760

"There are two favorite pastimes in Bergen-Passaic—shopping and eating," says Frank Savino, vp-marketing for the *Record*, New Jersey's largest evening newspaper, whose circulation is concentrated in this northeast corner of the state.

And although natives react negatively to any reference to the region as "a rich New York suburb," the area is wealthy and does take a lot of its lifestyle cues from its neighbor across the Hudson River.

Bergen County's desirability to those seeking New York proximity yet a suburban locale has made it a particularly expensive place to live. According to Jim Hulsizer, supervising planner for the Bergen County Planning Board, "with single family homes at $150,000, and that a handyman's special, many younger families can't afford to buy in this area." The prices in Passaic County, which is older and more urbanized, are only slightly less expensive. The median age in the area is 34.8, somewhat higher than that for the state.

Although Bergen County occupies only 3% of the state's total land, it is the most populated county in New Jersey. However, the combination of high property costs and an aging population has resulted in a population decrease between 1970 and 1980, which is projected to reverse only slightly within the next few years.

Per capita income for Bergen residents in 1983 was $17,962, ranking first of all N.J. counties. Passaic, which has a higher percentage of minority groups, was 12th in rank, with $12,636.

That wealth is not necessarily evenly distributed. Bergen-Passaic counties had their fair share of locals on *Forbes* magazine's recently published list of the 400 richest people in America. One resident, Russell Berrie (estimated $290 million), whose Oakland, N.J., firm Russ Berrie & Co. markets novelty products, recently made an unsuccessful bid to buy the New Jersey Nets basketball team.

Also weighing in at an estimated $250 million was Malcolm Borg, chairman of Macromedia Inc., the parent company of the Bergen Record Corp., which publishes the *Record*; of Macromedia Publishing Inc., which publishes the *News Tribune* of Woodbridge; and of Gateway Communications Inc., which owns four tv stations.

The *Record's* territory is inundated with small, community "shopper" papers and surrounded by other newspapers eager for a piece of the attractive Bergen market. Mr. Savino claims his biggest competition is "two little papers across the river,"—the *New York Times* and the *New York Daily News*. Nevertheless, the *Record* is making a strong push into neighboring areas. In 1984, it opened a new Passaic County headquarters, in Wayne, bringing it head-to-head with the *North Jersey Herald-News*, a morning-evening publication with combined circulation of 108,650.

While Bergen-Passaic residents are fairly dependent on New York for radio and tv coverage, New Yorkers—although often loath to admit it—rely heavily on the plethora of shopping available across the river.

Nine major malls exist in the region, five in Paramus on the major Routes 4 and 17. With more than 700 stores, they account for some 7.6 million sq. ft. of space. Clientele is well heeled. Combined, the two counties are in the top 10 in the country in median household effective buying income (EBI).

Another mall is under way on Rte. 4, called Mall on IV; Federated Department Stores already has opened a 25,000 sq. ft. Filene's Basement off-price clothing store there. A second Filene's Basement is scheduled to open just a few miles away on Rte. 17 by the end of the year.

New Yorkers are not the only ones traveling to shop; even on the seventh day, few seem to rest. Because the blue laws prohibit Sunday openings in Bergen County, many residents head for the four malls in nearby Wayne in Passaic County.

The continued boom in wholesale/retail sales is partially responsible for a continued surge in employment, although such growth is often erratic, because of the seasonal nature of the retail business. Nonfarm employment in Bergen County rose sharply from July, 1985, through July, 1986, by some 17,000 jobs, or 3.9% compared to a 2.9% statewide gain, according to the New Jersey Department of Labor.

Building activity has been especially strong over the past two years. The New Jersey Department of Labor reports that July, 1986's construction industry job count of 19,200 in Bergen was the highest level posted since record keeping began in 1960.

Among the corporate giants that have their headquarters or large operations here are A&P, Becton Dickinson and CPC International. Companies with U.S. headquarters in the area include Sony U.S.A, Sharp Electronics, Grand Union and BMW.

Within the next two years, Marriott Corp. plans to have a full-service hotel at Overpeck Corp. Park in Ridgefield Park, with 254 rooms, health club facilities and two corporate meeting rooms, at an estimated cost of $21 million. JD Construction Corp. is building a 25-story hotel-office complex on the site of the former Ford Motor plant in Mahwah as part of a $300 million "International Crossroads" project.

RANK **8**

Boston

Beantown

($ in thousands)

1985 vital statistics

Population	2,831,700
Disposable income	$55,280,138

Boston is on a roll. The New England Patriots, which call suburban Foxboro home, made an unexpected trip to the Super Bowl in January following a late season surge. That the Patriots were ignominiously mauled by the Chicago Bears did little to dampen local enthusiasm.

The Boston Celtics won the National Basketball Championship last spring, and the long-suffering Boston Red Sox realized "the possible dream"—as expressed in the local media which had called the '67 Red Sox pennant winners the "impossible dream"—by taking the American League Pennant. Even though the Bosox failed to win the World Series against the most tantalizing matchup conceivable for Boston—the New York Mets—the difference in attitude reflects the positive

UNIVERSITY OF VIRGINIA

THE COLGATE DARDEN GRADUATE SCHOOL OF BUSINESS ADMINISTRATION

EXECUTIVE EDUCATION

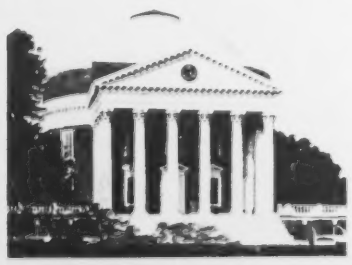
"Sales Management & Marketing Strategy"
January 25-30, 1987
March 22-27, 1987

"Industrial Marketing"
February 15-20, 1987

"Marketing & Sales Executives' Program"
May 3-15, 1987

For further information on this or other Executive Programs please write or call:

EXECUTIVE PROGRAMS
The Darden School
University of Virginia
Post Office Box 6550
Charlottesville, Virginia 22906-6550
Telephone: (804) 924-3000



changes the city has undergone.

From a development standpoint a decade-long boom continues unabated. Depending upon the government official asked, anywhere from $1 billion to $3 billion in construction is under way or imminent, and more is already in the planning stages.

Development also has spilled over into the suburbs, particularly west of the city in the Framingham/Natick area, which grandly calls itself Metro West. Development has become so intense and traffic so congested in the area that plans for an expanded General Motors production facility in Framingham were scrapped when the local authorities, under pressure from the community, hesitated at providing the necessary permits and variances carte blanche.

People are beginning to question the wisdom of continued unrestrained development. In particular, the area's transportation network is severely strained. A $2.2 billion project to eliminate the most intractable bottleneck, the Central Artery and the harbor tunnels, by depressing the elevated highway and adding a third harbor tunnel to the airport, has bogged down in Congress over funding.

In downtown Boston, traffic congestion has reached crisis proportions. More than 2.2 million people enter downtown Boston every day over much the same road network laid out in 1630, and the numbers are increasing annually. A shortage of parking spaces compounds the problem.

Unable to wait for the Central Artery/Harbor Tunnel project, the city has embarked on its own plan to aid traffic flow within the infrastructure that exists now. Aggressive towing at traffic bottlenecks has helped. The city also is making an effort to increase parking by 5,000 to 10,000 spaces at peripheral downtown locations like South Station and North Station.

The city also is trying to steer some development away from downtown, although the effort is not motivated by traffic concerns. Mayor Raymond Flynn's plans to spread the development wealth by linking downtown development with development of depressed areas appears to be progressing although the formal linkage plan itself has been challenged in court and has suffered some setbacks.

Ironically, the first efforts at linkage are occuring at a time when a secessionist movement within the depressed minority communities of Boston is gaining some momentum. A nonbinding referendum on the November ballot asked residents if they favored the creation of a separate city consisting of minority neighborhoods comprising roughly 25% of the city (non-downtown areas)—and it lost. Supporters already have named the new city Mandela, in honor of the imprisoned South African leader.

The Boston area is packed with colleges and universities, and each fall students markedly increase the city's population. The main event in education this year is Harvard University's 350th birthday. The educational establishment in the greater Boston area brings about $4 billion in revenue into the local economy. Private schools contribute $3.5 billion of this money, and $585 million comes from state-supported institutions.

The state's electronics industry is struggling through a national slump, but despite 7,000 layoffs in the computer field over the past year, the state's 4% unemployment rate is one of the lowest in the country. Other technology industries, such as genetic engineering, are starting to take off. Paul Tortelani, commissioner of the Massachusetts Dept. of Commerce and Development, predicts bioengineering will grow 300% in the next three years.

Within the media community, five tv stations have changed hands since March. Most important, Rupert Murdoch purchased WXNE-TV from Continental Broadcasting Network as part of his fourth network effort—Fox Television Stations. As a result of the purchase, Mr. Murdoch will have to sell the *Boston Herald*, which still trails the *Boston Globe*, the powerful mainstay Boston newspaper, in circulation and advertising.

Westinghouse's WBZ-TV (NBC) edged out Hearst's WCVB (ABC) for top spot in the tv market with a 7.3 rating/21 share, according to A.C. Nielsen's May report.

RANK **46**

Buffalo, N.Y.

City of Good Neighbors

($ in thousands)

1985 vital statistics

Population	971,400
Disposable income	$11,110,408

Buffalo has been referred to by those who live here as a "well-kept secret." But while its qualities may be foreign to points south, it is not an unknown commodity to the north.

The metro area, New York State's second largest, is located on the banks of the Niagara River, bordered by Lake Erie. The Peace Bridge, which joins Buffalo to Fort Erie, Ont., is the most heavily traveled border crossing in the U.S.

The proximity of Canada unofficially widens the market area to include southern Ontario. Residents there rely on Buffalo radio and tv. Many Canadians cross the border daily to make use of Buffalo area shopping malls and discount stores.

But while Buffalo is a day's drive and an hour's commute by air to 62% of the Canadian buying power and 75% of the Canadian manufacturing capabilities, 50% of the U.S. buying power is within this same perimeter.

This self-proclaimed "City of Good Neighbors," whose suburban residential and commercial areas have been on an upswing for some time, has been going through heavy urban renewal itself, and not without certain hiccups.

The city has spent $500 million on an above and below ground light rail rapid transit system, yet the system has been plagued by poor planning and management and structural problems. The main problem is that the system's 6.2 miles are not in the populated areas, but cover the nonresidential downtown area. To make matters worse, only five of the system's 6.2 miles are functional.

A mile-long pedestrian mall, dubbed Buffalo Place, is being built downtown along the route of the rail system. The mall, scheduled to be finished in 1987, will connect the retail, office and entertainment district. City officials view the mall as crucial to the future success of the metro rail system.

An attitudinal transformation is what the Buffalo Area chamber was after in late November when it produced the first annual Winterfest, which included 22 athletic and cultural events. Sponsored by Gibraltar Steel, Goldome FSB, Marine Midland Banks and Anheuser-Busch among others, Winterfest's intent is to position the area as a winter wonderland.

Recreation is largely a function of the climate. There are 20 ski areas within a 90-mile radius, netting over $80 million annually, and area operators are eager for the 90-average inches of snow that fall annually.

The economic climate in Buffalo is improving. There has been a shift from blue collar to white collar jobs. Service-oriented jobs have climbed from 18.5% to 30% of the work force in the last 15 years. Disposable household income has increased in the process, from $19,000 to $24,000 in the past five years.

Financial services abound. Goldome, with assets of $11.5 billion, Marine Midland, $23 billion, and Empire of America FSB, $8.6 billion, all are headquartered in Buffalo. These institutions have helped turn Buffalo into a financial hub in the northeast, but also have stimulated the local economy through job growth, corporate sponsorship, contributions and ad dollars. This year, Empire which operates in 46 states, purchased controlling interest in Levy, King & White Advertising, Buffalo, which handles its $8 million account.

Unemployment is down from 12% in 1985 to 7%. Skilled labor, in significant supply as a result of recent steel industry and factory closings, provides employers with a strong talent pool.

Media have undergone tremendous change during the past two years. Buffalo, home to five commercial tv stations, a host of cable stations, and 11 am and 14 fm radio stations, placed 36th in recent ADI rankings.

In July of 1986, WKBW-TV, Buffalo's top-rated ABC affiliate with an 8.5 rating and 27 share in A.C. Nielsen's May report, was sold by Capital Cities/ABC after their merger to comply with FCC regulations limiting network-owned stations to five markets.

The station was bought for $65 million by a group of investors consisting of the Jackson Brothers musical group, former NFL football star O.J. Simpson, NBA star Julius Erving and Edward Lewis, ceo/publisher of *Essence* magazine. WKBW, the am station sold by Cap Cities/ABC to Price Communications, changed its call letters to WWKB. WGRZ-TV, the NBC affiliate rated third in Buffalo tv, was sold in March, 1986, by General Cinema to Acquisition Corp. Both stations are cleaning house to boost sagging ratings.

The *Buffalo News* continues to be the only daily, controling the market with its sunrise and evening editions. Its rates have gone up five times, an average of 8% each time, since the Courier Express closed down four years ago.

Construction of a $54.7 million sports stadium, dubbed Pilot Field, is currently under way in the downtown area. The stadium, which will be the new home of the Bisons, a Cleveland Indians' AAA farm team, is scheduled to open in 1988. Bisons' owner Bob Rich Jr., president of Rich Products Corp., would like to see major league baseball here in the near future.

RANK **42**

Charlotte-Gastonia-Rock Hill, N.C.-S.C.

Queen City

($ in thousands)

1985 vital statistics

Population	1,049,000
Disposable income	$12,117,559

Charlotte, largest city in the Carolinas, still bears the imprint of the Scotch-Irish Presbyterian farmers and traders who founded it in 1768—safe, solid, short on flash.

An ex-city council member characterized its present council, elected in a combined ward-at-large system, as "the Charlotte boys' and girls' choir. They're sitting there singing out of the same songbook. It's the most homogenous bunch [in spirit] I've ever seen." He's talking of a black mayor, Harvey Gantt, who was elected with almost 40% of the white vote; Jewish mayor pro tem Al Rousso, and a council with half of its members women.

There is no one industry or family—there are patricians—that dominates in Mecklenburg (Charlotte) County where unemployment is a low 4.3%. The Mecklenburg labor force has jumped almost one-third in the last 12 years, to 250,300 in August, 1986.

The largest employer is IBM, which has an ever-expanding work force of more than 5,000 who make computer printers and electronic banking equipment in modern quarters in the rolling hillsides of north Mecklenburg's University Research Park.

Forbes magazine listed two local retailing names in its October account of the country's 400 wealthiest: Leon Levine, chairman of Family Dollar Stores, with $260 million, and the Belk family, whose fortune of more than $350 million, *Forbes* said, was divided among 25 family members.

The city is a financial center, home to the Southeast's largest bank holding corporation, NCNB Corp., whose recent mergers have ballooned it to $24 billion in assets. Charlotte-based First Union Corp. has $21 billion, and First Wachovia Corp. of Winston-Salem, N.C., has a strong presence in the city.

Mecklenburg County, with an estimated population of 442,448, is at the center of a seven-county MSA of 1,070,350. And those one million have

Where Ad Age got its data

The 100 leading markets are the 100 most populous Metropolitan Statistical Areas (MSAs) as of July 1, 1985, in the U.S., as ranked July 30, 1986, by the U.S. Department of Commerce, Bureau of the Census, Washington.

Consolidated Metropolitan Statistical Areas (CMSAs) such as New York, were broken down into Primary Metropolitan Statistical Areas (PMSAs) such as New York, Nassau-Suffolk, N.Y., Newark, N.J., etc. Only PMSAs and MSAs were ranked.

Retail sales and disposable income figures for 1985 were supplied by Marketing Economics Institute, New York.

These figures were tabulated to correspond to MSAs as closely as possible. Sales and income data for 1982—the last time Advertising Age profiled 100 markets—also was supplied by MEI. Ad Age avoided making growth comparisons between 1982 and 1985 because geography of a few MSAs was redefined in the period.

Employment statistics were supplied by the U.S. Department of Labor, Bureau of Labor Statistics, Washington. Regional breakouts of this information conform to those of the Department of Labor.

A.C. Nielsen figures used in the profiles to rank the tv markets are for sign on to sign off from its May, 1986, reports. A rating is the percentage of total households in the market watching the channel.

A station's share is its percentage of only those households with their sets turned on.

Arbitron data for radio markets is for viewers 12 and over from the spring sweeps.

Staff for this report

- R. Craig Endicott, *profile issues editor*
- Julie A. Doherty, *profile issues associate editor*
- Kevin Brown, *assistant editor*
- Geoffrey Shives, *art director*
- Karen Brodsky, *production director*
- Christopher Colletti, *graphic designer*
- Sandra Davis, *editorial assistant*
- Virginia Hunsche, *copy reader*
- Thomas Harney, *reporter/intern*
- Denise O'Neal, *research assistant*

Cover photo: Andy Caulfield
©The Image Bank
Lettering: Jeffrey Toth

Writers for this 100 leading U.S. markets report

For this issue, Ad Age relied on writers who live or once resided in the markets they covered. Space limitations held local color to a minimum. But that was unfortunate for the reader, because the writers, lacing the largely statistical analyses with good down-home character, had editors salivating over their discussion of blackened red fish at New Orleans' fine Prudhomme's, and the barbequed, chopped pork sandwich and slaw that sets apart Raleigh-Durham-Chapel Hill, at least in a culinary sense.

Then there are the nine family-style Basque restaurants that followed immigrant sheep herders from the Pyrenees to Fresno, the mouthwatering mostaccioli served up in abundance on the "Hill" in St. Louis and the ever-present steamed clam digs of Baltimore.

Contributing writers, and the markets they covered: Craig S. Lovelace, Akron; John L. Klucina, Albany-Schenectady-Troy; Ben Dunlap Jr., Allentown-Bethlehem; Chuck Wingis, Anaheim-Santa Ana, Oxnard-Ventura, Riverside-San Bernardino; Jerry Schwartz, Atlanta; Van Wallach, Austin, Nassau-Suffolk, New York, San Antonio; Bill Rintoul, Bakersfield; Alex Montague, Baltimore; Eileen B. Brill, Bergen-Passaic; Dean Barber, Birmingham; Alan Radding, Boston, Providence, Springfield; Judith A. Biltekoff, Buffalo; Merle D. Kellerhals, Charleston; Hannah Miller, Charlotte-Gastonia-Rock Hill; Edward Morris, Chattanooga, Johnson City-Kingsport-Bristol, Knoxville, Nashville; Sara Stern, Chicago; John Newberry, Cincinnati; Bonnie Schwartz, Cleveland; Fred Monk, Columbia, S.C.; Mike Seemuth, Columbus; Tom Bayer, Dallas; Bruce Dawson, Dayton-Springfield; Julie Truck, Denver; Norma Green, Detroit; Ken Flynn, El Paso; Susan Garland, Fort Worth-Arlington; Maureen Glabman, Ft. Lauderdale-Hollywood-Pompano Beach, Miami-Hialeah, West Palm Beach-Boca Raton-Delray Beach; Lynn M. Turner, Grand Rapids; Bradley Johnson, Greensboro-Winston-Salem-High Point; Greg Myers, Greenville-Spartanburg-Asheville; David F. Forward, Harrisburg-Lebanon-Carlisle; Allen M. Widem, Hartford; Mark Coleman, Honolulu; Jennifer Lawrence, Houston; S.L. Berry, Indianapolis; Mary Sweat, Jacksonville; Marian Courtney, Jersey City; Diane Stafford, Kansas City; Sally Saville Hodge, Lake County; Tom Dye, Las Vegas; Tom Honeycutt, Little Rock-North Little Rock; Elliot Blair Smith, Los Angeles; Jim St. Clair, Louisville; John B. Simpson, Memphis; Barbara Frankel, Middlesex-Somerset-Hunterdon; Kathryn Mann, Milwaukee; Bob Geiger, Minneapolis; R[illegible]cca L. Paul, Mobile; Stephen McCarthy, Monmouth-Ocean; Mark Bittman, New Haven-Meriden; Sallie Rose Hollis, New Orleans; Linda Cecere, Newark; Kurt C. Hoffman, Norfolk-Virginia Beach-Newport News, Richmond-Petersburg; Alice Cuneo, Oakland, San Francisco; Curt Autry, Oklahoma City, Tulsa; Jim Williams, Omaha; David Wilkening, Orlando; Belinda Hulin-Salkin, Philadelphia; Marie Spadoni, Phoenix, Tucson; Vince Gagetta, Pittsburgh; William H. MacKenzie, Portland; Debra Simon, Raleigh-Durham-Chapel Hill; Jerold M. Rosen, Rochester, Syracuse; Patricia Martin, Sacramento; Thomas R. Dowell, Salt Lake City-Ogden; Gordon Smith, San Diego; Steven B. Kaufman, San Jose; Jim Collins, Scranton-Wilkes Barre; Mike Parks, Seattle, Tacoma; Lori Kesler, St. Louis; Christopher Bubin, Tampa-St. Petersburg-Clearwater; Shelley Wolson, Toledo; Carol A. Anderson, Wichita; Ed Cohen, Wilmington; Mary Ellen Crowley, Youngstown-Warren.

plenty of money to spend. The median household income after taxes is $23,623, right in line with the U.S. average of $23,680 but higher than the North Carolina average of $20,362. Almost 60% of the Mecklenburg County households have more than $20,000 in income; and the 1980 census showed 64% own their own homes.

Charlotte is riding the wave of its biggest construction boom ever. Between September, 1985, and September, 1986, 2.1 million sq. ft. of office space was added, for a total of 15.9 million. In that period, 1.3 million sq. ft. was absorbed. Much of the new space is in two office towers under construction downtown: 23-story First Citizens Center and 42-story Two First Union Plaza. When their footage is subtracted from the over-all vacancy rate, vacancy is 16.3%.

Piedmont, considering the city a major hub, is planning a $90 million expansion of its facilities built only four years ago to add 106 daily flights to its already existing 194 by 1988.

Most local print advertising is through the *Charlotte Observer*, a Knight-Ridder newspaper with two Pulitzer prizes and the largest paper in the two Carolinas, and estimated annual ad revenues of $80 million. The *Observer* has felt competitive pressure in recent years as small newspapers nearby were bought and improved by other chains. It has responded by creating seven regional tabloids concentrating on news of individual regions and offering lower ad rates, inserted in the main paper several times a week. A full-page ad in the weekday York (S.C. county) *Observer* is $273 and contrasts to a full-page, full-run ad in the main paper at $4,895.

In April, American Cities Business Journals of Kansas City started the *Business Journal*, which agency people say has gained respect as a business-to-business vehicle. Publisher Robert Powell says its 5,000 paid circulation, plus 12,000 to 15,000 circulation-building freebies and vending sales, met its first-year goals.

In tv, WBTV (CBS) with a 9 rating, 31 share, according to A.C. Nielsen's May reports, and WSOC-TV (ABC), 7.3/25, get the bulk of most local buys, but WPCQ (NBC) has joined them since instituting local news shows in September.

In an area without strong mass transit and where a large number of women work, drive-time radio is a strong market. In Mecklenburg, Union and Gaston counties, 59.5% of women worked in 1980, in contrast to 49.6% nationally. In the seven-county Charlotte-centered area that Arbitron Ratings Co. ranks as the 40th largest market among 259, there is a morning drive-time audience estimated at 201,200. Arbitron's spring rankings put WSOC-FM on top in the mornings with 12.8% of the listeners, followed by WBT with 11.4% and WEZC-FM with 11.1%. A station tied for fifth, WROQ-FM, is being sold, along with its sister am station, WAYS, for $13 million to CRB Broadcasting of New York.

Charlotte's growth is tilted heavily toward the south and southeast, where daily traffic jams have city fathers frantically trying to get an east-west road widened and to direct growth northward. Busiest areas include the I-77 corridor south to the South Carolina line and Billy Graham Parkway, running off it to the airport, and I-85 West. Outside downtown, the largest concentration of office space, some 2.6 million sq. ft., is in the I-77 corridor.

RANK **3**

Chicago

Windy City

($ in thousands)

1985 vital statistics

Population	6,176,900
Disposable income	$83,299,720

It's not uncommon to turn on the tv or view a movie and see Chicago's skyline looming in the distance. Since the filming of "The Blues Brothers" here in 1978, Chicago has become the third most popular city to film.

Eleven films were shot in Chicago in 1986 (bringing in $36 million to the city in revenues as well as 20,000 jobs) and included "About Last Night," "Nothing in Common," "Running Scared," "Ferris Bueller's Day Off" and "The Color of Money." Tv shows "Jack & Mike" and "Crime Story" also take place here.

The nation's third largest metro area had a city population of 2.9 million in 1984, down from 3 million in 1980, according to the U.S. Census. Some 54% of the population are 47-plus in age, 20% are 35-47, 17% are 6-17, and 9% are under 6. Racially, the city is 48.2% white, 39.8% black and 14% Hispanic and other. The market is the fifth largest Hispanic market in the country.

Chicago's suburban population is the fourth largest in the nation with just over 3 million. Those folks have total buying power of over $47 billion, ranking second in the nation behind LA/Long Beach, Cal. One of the more important counties rimming Chicago's Cook County is DuPage, west of the city. There, the population grew to 732,900 in 1986, up 5.3% from the year earlier.

The metro area is a study of contrasts. East Chicago Heights, with per capita income of $4,178, is among 11 of the state's poorest suburbs clustered south of the city in an area devastated by steel mill cutbacks. Lakefront Kenilworth, 40 miles north, is Chicago's wealthiest with a per capita income of $40,000. City and suburban employment grew 4.6% last year, surpassing the nation's job growth of 3.4%. Dissecting unemployment statistics, blacks are 25% of the jobless, Hispanics, 13%, and whites, 7.3%.

Chicago, the nation's third largest media market, has seen a proliferation of broadcast outlets in recent years as suburban print media also expand. Signals from 12 tv stations reach the metropolitan area, and cable tv penetration is only 35%, still below the national average. But major portions of the city are being wired.

The increasing number of uhf indies has made the market more competitive for local ad dollars and syndicated programing despite a weakened advertising sales environment. Grant Broadcasting's WGBO-TV was one new entry on the uhf dial. WSNS-TV in the past year became a SIN affiliate in direct competition with another Spanish-language station, WCIU-TV. WFLD-TV was sold by Metromedia to Rupert Murdoch's Fox Broadcasting Co. Mr. Murdoch then had to sell the *Sun-Times* to meet FCC regulations against multiple ownership of media in the same market.

Network o&o stations have done an about-face in local ratings. Perennial leader, WBBM-TV, the CBS affiliate and talent conduit for New York headquarters operations, has been on a slide the past few years. It has dropped behind No. 1 WLS-TV (ABC), which had a 9.4 rating, 25 share from sign on to sign off, according to A.C. Nielsen 's May report, and No. 2. WMAQ-TV (NBC), 6.6/18. WBBM-TV, 5.8/16, is attempting to build its ratings with a "First Edition" news program launched in September.

In print, the *Chicago Tribune* (circulation, 744,969) continues to add new sections targeting specific demographic and geographic segments, zoning many to city and suburban regions. Publisher Robert Page and an investor group purchased the *Sun-Times* (circulation, 612,686). Mr. Page has toned down somewhat the sensational aspects of the tabloid begun under Mr. Murdoch, but the daily still retains its readership strength among commuters and blue-collar workers.

Chicago radio programing formats have diversified in recent months as listener tastes have changed. A year

ago, at least half a dozen stations offered the adult contemporary music format, then dominant among fm outlets. Now, several have changed owners, personalities and formats to create a less homogenous mix of radio stations. WGN leads the ratings pack even without the morning banter of Wally Phillips, long its morning drive anchor who recently moved to evening drive time slot. WGN's success is tied strongly to Chicago's clogged expressways—commuters spend just over an hour commuting to and from work for one of the more lengthy commutes in the nation—and its sports-crazed denizens who tune in to WGN's broadcasts of the Cubs, Bears, DePaul and Notre Dame basketball.

Chicago's retailers, at least in and around the upscale North Michigan Ave. Magnificent Mile, continue to brace for Bloomingdale's arrival in the next 18 months as anchor tenant in the mixed-use $450 million 900 N. Michigan Ave. development that will also include the city's second Four Seasons Hotel. Building developer, Urban Investment and Develpment Co., also designed Boston's Copley Place and Water Tower Place in Chicago.

The city's old-guard department stores, Marshall Field's and Carson Pirie Scott, are sharpening their images and updating their stores in anticipation of the competition. Field's kicked off its major fall and Christmas "Eagle and the Crown" promotion (featuring goods from Great Britain) with a visit from Prince Charles.

RANK **29**

Cincinnati, Ohio-Ky.-Ind.

Queen City

($ in thousands)

1985 vital statistics

Population	1,412,000
Disposable income	$16,759,590

Cincinnati approaches its 1988 bicentennial with a reputation as one of America's most livable cities, thanks in part to a diverse economy base and a hilly, riverside terrain that has withstood most inclinations toward monotonous urban sprawl.

The chamber of commerce launched a campaign to publicize Cincinnati as the "Blue Chip City" several years ago, but the idea hasn't caught on with the local populace, which still prefers the traditional "Queen City," despite its undesired modern connotation.

New office construction and the expanded second-level skywalk system have transformed the downtown area, but activity has practically come to a halt while developers wait to fill some 2 million sq. ft. of stubbornly empty space. Vacancy rates have hovered around 18% for months.

Five office towers ranging in size from 396,000 sq. ft. to 668,000 sq. ft. came on line in the first half of the decade, but no more major projects are expected until the 1990s.

The city's $200 million Fountain Square West project is scheduled for completion by 1992, although final development plans are still being worked out between the city and the developer. It will include a multi-level retail arcade, a luxury hotel and 500,000 plus sq. ft. of office space. The project is a result of a highly publicized bidding war between several national developers. The office tower, topping off at some 700 feet, will anchor the west side of Fountain Square in the heart of the city. To the east the square is framed by Procter & Gamble's newly opened international headquarters, humorously known as the "Dolly Parton" towers.

With the downtown office market saturated, focus has shifted to development of land along both the Ohio and Kentucky sides of the Ohio River and along the interstate corridors in the northern suburbs.

Much of the area's growth has been aided by the presence of General Electric's Aircraft Engine Business Group in nearby Evendale. General Electric, Greater Cincinnati's largest employer, has seen business and employment surge in recent years as a result of strong orders for both its military and commercial jet engines. Major employers after GE are Procter & Gamble, Kroger, the University of Cincinnati and the federal government. Together, they form the nucleus of a regional economy that's highly resistant to cyclical national swings.

However, the area's traditionally strong machine tool industry never really got back on its feet after the 1982 recession, in part because of increasing automation in manufacturing processes and also because of fierce price competition from foreign machine tool builders. Cincinnati Milacron remains a major employer because it is the dominant force in the industry and has invested heavily to refocus its operations away from basic machine tools.

The local media market has remained relatively stable in recent years, probably in part because of the dominance of two locally based media companies, Taft Broadcasting Co. and Scripps Howard.

Taft owns WKRC-TV, the local ABC affiliate, as well as WKRC and WKRQ-FM, two strong radio properties. Scripps Howard owns WCPO-TV, the traditionally dominant CBS affiliate, and *Cincinnati Post*, the city's afternoon daily.

Although Taft has put five of its tv stations on the market, possibly in response to takeover threats, none are local properties. Despite weak profits in recent quarters because of heavy debt load, Taft continues to operate its Electra 24-hour teletext news service which is broadcast nationally over WTBS's cable signal.

Taft figures the service will eventually generate advertising revenue and profit, but there are not yet enough sets on the market capable of decoding the teletext signal. Zenith began manufacturing digital sets with built-in decoders earlier this year, and efforts are under way to convince other manufacturers to do the same.

WIII-TV, a uhf indie, filed for Chapter 11 under the bankruptcy act in May and may be for sale pending a court decision on a recent reorganization plan. The station is a converted stv operation that has never built ratings comparable to the other indie, WXIX.

Another Cincinnati-based media company, Jacor Communications Corp., has acquired the two top-rated radio stations in the city in the past year. Jacor's Terry Jacobs enticed Frank Wood of WEBN-FM, the city's longtime advertising leader, with an offer to merge operations. Mr. Wood moved over to corporate headquarters as president-coo.

Several months later, Jacor announced an agreement to buy Republic Broadcasting Co., owner of WLW, the city's top-ranked am outlet. That agreement has prompted Republic to sell off its fm station, formerly WSKS-FM, after changing its format from album rock to country music.

The Gannett-owned *Cincinnati Enquirer* remains the dominant daily newspaper in both circulation and advertising sales. It operates in a JOA with the rival *Post*.

Cincinnati Business Courier, a 2-year-old business weekly, was sold to Kansas City-based American Cities Publications. The sale was part of a buyout of *Courier's* corporate parent, Indianapolis-based Business Journal Publications.

RANK **22**

Cleveland

Forest City

($ in thousands)

1985 vital statistics

Population	1,860,000
Disposable income	$25,249,560

Civic pride is on the upswing in

Harriet E. Miers, Attorney, Dallas, Texas

*Every morning in Dallas, often before the sun rises, people in business are already at work consulting the leader in the field. The Business section of The Dallas Morning News. Reporting late-breaking business news and providing in-depth analysis and forecasts. With a focus on different areas of special interest to Dallas business every day. For coverage beyond the boardroom and beyond the basics, no one does better business. Because keeping up with news and trends simply isn't good enough. Staying ahead is what business in Dallas is all about. The Dallas Morning News. Being the best advertising medium in Dallas has made us the nation's leader in total full-run advertising.**

*Circ. 390,275 Daily / 521,727 Sunday** Nobody beats The Dallas Morning News in the morning.*

Dallas reads

The

Dallas

Morning

News

*Media Records, 1985. **ABC Publisher's Statement, March 31, 1986. Represented nationally by Crosthwaite Woodward O'Mara & Ormsbee, Inc.; Grant H. Webb & Co., Inc.; The Colin Turner Group; The Leonard Co.; Lenha Hawaii; Publications Representatives International, Inc.

Cleveland. The new boosterism replaces the self-deprecating attitude of just a few years ago when the city, facing such problems as bankruptcy and a river—the Cuyahoga—that caught fire, was often referred to as "the mistake on the lake."

In the new Cleveland—boosted by a campaign titled: "On America's North Coast"—the economy is stabilizing. The downtown landscape is dotted with new buildings including Standard Oil Co. of Ohio's massive $200 million headquarters on Public Square. An entertainment complex is housed in the restored theaters of Playhouse Square, and new recreation and residential areas are developing in the Flats and Warehouse Districts, former industrial areas adjacent to downtown.

More than $600 million is being invested in new construction in downtown Cleveland, while other local landmarks like Tower City and the Halle Building are being restored.

Added to this is a campaign to build a domed stadium and the city's recent selection as the site of the new Rock 'n Roll Hall of Fame. (The term "rock 'n roll" was coined by former Cleveland disc jockey Alan Freed and the city has long billed itself as "the rock 'n roll capital of the world.")

A few years ago the area's location in the country's "rust bowl" was being lamented. Many today are convinced that the city's position on "America's North Coast" will play an important role in its economic revival. Located on the southern shore of Lake Erie, Cleveland has the advantage of an enormous fresh water reserve: A fact city leaders say will draw new industry, from shipping to manufacturing.

The Cleveland area already is headquarters to 85 corporations with annual sales of more than $100 million each. The city ranks fourth in the number of *Fortune* industrial corporate headquarters and ninth in non-industrial headquarters. Cleveland recently got Harcourt Brace Jovanovich, the giant publishing company, which moved many of its publications from New York to a new facility in suburban Middleburg Heights.

Although much of the Cleveland's economy is becoming more service based, the area remains a leading industrial market. The seven-county CMSA area has 768 plants employing 100 or more and more than 2,000 plants with 20 to 99 workers.

Among the area's largest employers are the federal government, Ford Motor, Goodyear Tire & Rubber, Cuyahoga County agencies, LTV Steel, General Motors, the city of Cleveland, Ohio state agencies, the Cleveland Clinic Foundation and Ohio Bell.

Scripps Howard Broadcasting's ABC affiliate, WEWS, leads market rankings with an 8.8 rating, 28 share from sign on to sign off, according to A.C. Nielsen's May report. WJW (CBS), a Storer station owned by Kohlberg, Kravis, Roberts, ranked No. 2 at 7.3/23. WKYC, an NBC o&o station, trailed at 6.8/21. Cleveland has several independent uhf stations including WUAB, a strong indie at 2.7/9, and WCLQ, which recently began carrying the Home Shopping Network. The PBS station is WVIZ.

There also are 26 am and fm radio stations, although the fm dominate the pack with the first six rankings in the market. The end of October marks the debut of Cleveland's newest rock station, WNCX-FM. The station is replacing WGCL-FM, former rival to WMMS-FM, the heads-on leader in the market with nearly twice the listeners of its nearest competitor, according to Arbitron's spring sweeps.

Eight WMMS-FM staff members have left their jobs to join the new station, including radio personalities. The old WGCL-FM, ranked 6th in the market, and its sister station WERE-AM, No. 12, were recently acquired by Metropolis Broadcasting of Detroit. There are no plans to change WERE's all-talk format. The new station is aiming for a more adult market and will play rock 'n roll.

With the closing of the *Cleveland Press* more than four years ago, Cleveland became a one newspaper town. The *Plain Dealer*, a Newhouse publication, is published daily and Sunday with a daily circulation 452,000, up 11.6% from 405,000 before the *Press* folded in 1982. The big increase occurred in the *PD's* Sunday edition, where the circulation went from 448,000 in 1982 to 552,000 in 1986.

Roldo Bartimole, Cleveland's media watchdog and publisher of *point of view*—a local media-watching newsletter—says there has been "a loss to the public" since the *Press* closed. Stories that should get in the next day, sometimes get in a day or two later [without competition]," he says. Although there are other area publications like *Cleveland Magazine*, Mr. Bartimole says none of these can fill the gap.

Several outlying cities like Elyria and Lorain publish smaller dailies. There also is a number of weekly suburban papers including those published by Sun Newspaper chain.

Regional publications include *Crain's Cleveland Business, Cleveland Magazine, Northern Ohio Live, Western Reserve Magazine, New Cleveland Woman Journal* and *Scene*.

Cleveland has long been recognized for its outstanding cultural offerings such as the city's renowned orchestra and ballet company. University Circle boasts a number of world-class museums including the Cleveland Art Museum, the Western Reserve Historical Society and Natural History Museum.

RANK **35**

Columbus, O.

Buckeye Capital

($ in thousands)

1985 vital statistics

Population	1,287,600
Disposable income	$15,309,271

Most have heard of the "perfect 10," but Columbus boasts of a "perfect 20"—the four major industries of government, consumer services, business services, retail trade and manufacturing, each accounting for approximately 20% of Columbus-area employment.

This broad economic base helped Columbus emerge from the recession of the early 1980's with barely a bruise, and is now fueling growth in the capital city.

Thanks in part to a big government base, the area's average annual unemployment rate peaked at 9.3% during the worst years of the recession, well below the 12.5% high for Ohio. Now the unemployment rate in the seven-county metro area is down to 6%, well under Ohio and U.S. levels.

Sharp growth in the retail and service industries has lifted employment as well. New stores have been opened in recent years by general-merchandisers, Meijer's, Andersons, Wholesale Club, Warehouse Club and Golden Bear Home Centers. The only upscale department store in town is Lazarus, a unit of Federated Department Stores. But new competitors are in the wings—Marshall Field's of Chicago and L. S. Ayers of Indianapolis have expressed interest in entering the Columbus market.

One trend that is attracting the attention of retailers is Columbus' population growth. With approximately 900,000 residents within its city limits, Columbus has surpassed Cleveland as the most populous city in Ohio. Aggressive annexation by the city pulled fast-growing suburbs into the fold, offsetting a decline in population in the city's core neighborhoods.

A growing number of Columbus residents are buying and renovating older homes in urban neighborhoods. One such neighborhood, German Village—a collection of quaint brick homes, restaurants and specialty shops—has become a model for other neighborhoods surrounding the downtown area.

Many of the newer Columbus-based companies have set up headquarters in the northern suburbs. Wendy's International employs several hundred workers at its headquarters in Dublin.

But the biggest employers are public-sector organizations located in, or near, downtown Columbus. The top five are the state government (20,000 employes), Ohio State University (14,500), the federal government (11,000), Columbus public schools (8,500) and the Columbus city government (7,500).

A flurry of construction has added more than 3.5 million sq. ft. of new office space in the Columbus area since 1981. Among the most prominent additions to the city's skyline are the 31-story Huntington Center, opened in 1985, and the 26-story Capitol Square Office Tower, opened in 1984.

Vacancy rates of nearly 20% have slowed construction of suburban office space, but downtown office space is expanding at a swift pace. A new 26-story office building, One Columbus, recently was completed. Ground has been broken for 25-story and 31-story office buildings, which will be occupied by agencies of state government. And Nationwide Insurance Cos. has started construction of a 26-story office building that will house part of the Columbus-based company's administrative operations.

Several fast-food companies—including Wendy's, Bob Evans, Rax, White Castle and G.D. Ritzy's—started in Columbus and developed into national chains. The area has been a good testing ground for other retail products, too.

Financial services is another industry with a major presence: Banc One Corp. and Huntington Bancshares Inc., two regional bank holding companies, are located here; and there are more than 50 insurance companies.

Manufacturing hasn't been a fast-growing industry, but it isn't declining either. Some old-line manufacturing companies have made deep cuts in local payrolls. Owens-Corning Fiberglas Corp. of Toledo has announced the permanent layoff of 700 to 900 employes at its Columbus-area plant, which employs 2,000. Some new manufacturers have set up shop, especially automotive parts makers drawn to the Columbus area by a new Honda Motor Co. plant in Marysville, a 40-minute drive from downtown.

Faster growth is occurring in warehousing and distribution, largely because of Columbus' mideast location and accessibility. Retailers with major distribution centers in the Columbus area include Sears, Roebuck & Co., with a huge 4 million sq. ft. center, J.C. Penney, The Limited, Whirlpool and Kroger. Tiger International operates an 196,000-sq.-ft. air cargo terminal.

Tourism is big business, largely because of such annual events as the Columbus Ford Dealers 500 auto race, the Ohio State Fair (the nation's larg-

BIG GAME HUNTERS

...bag big profits with the PROFIT TICKETS!

Now big game hunters can confidently set their marketing sights on potent game promotions which will dramatically increase traffic and sales.

You can turn to Chicago Lithographing Company. We've earned our big game reputation with game, sweepstake and lottery programs exclusively. We have successfully helped promotional firms with the development and production of big games for major supermarkets, oil companies, state lotteries and fast food chains.

Chicago Litho has printed billions and billions of Profit Tickets, including scratch-off and punch-out style, for satisfied customers throughout the world.

Chicago Litho is a single source supplier for your big game promotions. There is no second handling, second guessing nor costly delays due to additional suppliers.

Our extensive facilities offer you everything from high speed multi-color presses to sophisticated numbering, perforating, die-cutting and collating equipment. We have the controls to help you produce secure hidden image games. You can have us compute the odds for pay-offs and handle the dispersion of prizes. Added to each job are strict security, controlled distribution, and on-time delivery.

So if you're a big game hunter stalking a successful promotion, talk to the single source professionals who know the territory. Contact us for complete information.

Chicago Lithographing Company

560 S. Vermont, Palatine, IL 60067 (312) 359-3733

100 leading markets by retail sales

Rank Pop.	Rank Re-tail	Market	Total sales	1985 retail sales by category: Food	Drug-store	Gen'l mdse	Apparel access.	Furniture home	Auto store	Gasoline station	Lumber hardware	Eating & drinking	Other
2	1	Los Angeles-Long Beach, Cal.	$49,883	$9,806	$1,926	$5,768	$2,718	$3,122	$11,181	$3,350	$1,890	$5,362	$4,760
1	2	New York	37,741	7,883	1,297	4,355	3,588	2,676	4,784	1,359	1,096	4,709	5,993
3	3	Chicago	36,500	6,429	1,678	4,488	2,756	2,051	7,354	2,408	1,377	3,797	4,160
4	4	Philadelphia, Pa.-N.J.	28,060	4,465	901	3,489	1,666	1,351	6,152	1,837	1,153	2,489	4,557
8	5	Boston	26,341	4,652	897	2,892	1,711	1,334	5,407	1,786	1,153	2,929	3,579
6	6	Washington D.C.-Md.-Va.	24,461	4,628	947	3,026	1,452	1,500	5,512	1,904	866	2,517	2,110
5	7	Detroit	24,041	4,456	1,103	2,866	1,489	1,251	5,945	1,975	1,044	2,292	1,620
9	8	Nassau-Suffolk, N.Y.	19,893	4,117	563	2,180	1,266	1,298	3,729	1,157	938	1,586	3,059
7	9	Houston	19,679	3,831	525	2,252	1,129	1,053	5,351	1,325	1,064	1,804	1,344
12	10	Dallas	18,452	3,296	458	2,045	1,044	1,041	5,073	1,344	785	1,774	1,591
10	11	Atlanta	16,858	3,043	509	2,162	802	813	4,012	1,399	1,022	1,713	1,383
13	12	Minneapolis-St. Paul, Minn.-Wis.	16,369	2,760	429	2,378	762	812	3,806	1,409	919	1,532	1,563
17	13	Anaheim-Santa Ana, Cal.	16,273	2,997	546	2,001	831	949	3,748	1,094	791	1,867	1,447
11	14	St. Louis, Mo.-Ill.	14,667	2,907	409	2,082	702	714	3,430	1,287	756	1,367	1,013
16	15	San Diego	13,755	2,572	484	1,814	634	841	3,198	923	609	1,497	1,184
14	16	Baltimore	13,353	2,697	466	1,596	674	662	2,910	1,028	566	1,324	1,429
18	17	Oakland, Cal.	12,684	2,597	602	1,607	556	711	2,784	869	569	1,206	1,184
23	18	Phoenix, Ariz.	12,681	2,623	482	1,368	496	794	3,133	867	667	1,257	993
21	19	Tampa-St. Petersburg-Clearwater, Fla.	11,999	2,647	399	1,384	426	702	2,912	856	597	1,206	870
25	20	Seattle	11,722	2,349	451	1,331	674	648	2,344	796	626	1,389	1,115
27	21	San Francisco	11,694	2,181	455	1,335	766	705	2,151	639	425	1,696	1,340
15	22	Pittsburgh	11,369	2,373	380	1,708	563	529	2,543	831	477	1,043	923
22	23	Cleveland	11,327	2,372	503	1,624	577	565	2,294	1,010	400	1,112	869
26	24	Denver	11,280	2,184	236	1,307	528	695	2,713	789	617	1,233	978
24	25	Miami-Hialeah, Fla.	11,105	1,887	455	1,283	877	662	2,853	741	386	1,031	929
20	26	Newark, N.J.	11,091	2,478	318	944	706	707	2,408	777	464	954	1,334
19	27	Riverside-San Bernardino, Cal.	10,859	2,440	402	1,300	415	508	2,330	915	695	1,080	774
30	28	San Jose, Cal.	10,056	1,858	418	1,349	491	663	2,275	695	440	1,020	848
33	29	Bergen-Passaic, N.J.	9,552	1,861	270	1,132	698	607	1,937	665	372	810	1,198
41	30	Ft. Lauderdale-Hollywood-Pompano Beach, Fla.	9,275	1,682	329	956	483	612	2,598	599	329	1,036	650
28	31	Kansas City, Mo.-Kan.	9,059	1,655	272	1,324	474	375	2,037	718	394	882	927
29	32	Cincinnati, O.-Ky.-Ind.	8,831	1,818	324	1,396	357	439	1,778	790	366	946	617
39	33	Fort Worth-Arlington, Tex.	8,500	1,674	197	1,041	423	389	2,379	540	434	766	659
36	34	Sacramento, Cal.	8,348	1,730	406	948	317	474	1,888	628	468	865	624
31	35	Milwaukee	8,341	1,697	259	1,103	354	435	1,798	675	332	876	811
35	36	Columbus, O.	8,272	1,636	243	1,091	331	440	1,923	783	339	872	613
37	37	San Antonio, Tex.	7,637	1,614	141	926	408	432	1,851	587	405	773	500
40	38	Portland, Ore.	7,454	1,262	116	1,378	363	389	1,603	503	284	802	755
38	39	Indianapolis	7,356	1,227	295	903	322	338	1,775	736	347	734	680
32	40	New Orleans	7,352	1,668	297	840	474	446	1,473	504	322	811	517
61	41	Hartford, Conn.	7,184	1,402	257	739	422	350	1,546	605	316	692	857
34	42	Norfolk-Virginia Beach-Newport News, Va.	7,136	1,348	188	863	391	480	1,673	506	331	678	678
42	43	Charlotte-Gastonia-Rock Hill, N.C.-S.C.	6,607	1,497	208	661	380	349	1,658	415	376	538	526
53	44	Orlando, Fla.	6,576	1,252	166	751	267	327	1,784	486	378	679	488
45	45	Oklahoma City	6,561	1,143	117	762	396	374	1,975	314	426	625	427
95	46	Bridgeport-Milford, Conn.	6,357	1,189	159	688	407	343	1,320	465	317	535	934
50	47	Middlesex-Somerset-Hunterdon, N.J.	6,300	1,368	161	707	403	444	1,195	517	284	505	718
51	48	Monmouth-Ocean, N.J.	6,268	1,382	172	622	298	282	1,604	453	307	569	579
52	49	Nashville, Tenn.	6,117	1,185	178	807	270	286	1,521	565	254	569	482
48	50	Memphis, Tenn.-Ark.-Miss.	5,789	1,147	193	751	325	310	1,438	559	213	447	406
63	51	West Palm Beach-Boca Raton-Delray Beach, Fla.	5,705	1,141	210	613	352	400	1,396	366	258	558	409
54	52	Greensboro-Winston Salem-High Point, N.C.	5,690	1,098	190	622	312	355	1,353	385	297	515	563
49	53	Dayton-Springfield, O.	5,634	1,179	162	806	235	288	1,211	528	216	570	438
44	54	Rochester, N.Y.	5,590	1,194	226	615	267	278	1,374	375	248	518	495
43	55	Salt Lake City-Ogden, Utah	5,526	1,123	130	699	275	358	1,337	397	327	435	444
64	56	Austin, Tex.	5,306	1,010	104	582	297	318	1,366	315	405	559	348
59	57	Richmond-Petersburg, Va.	5,195	1,087	202	703	252	244	1,147	452	214	427	466
46	58	Buffalo, N.Y.	5,067	1,239	235	588	314	253	1,045	319	177	522	375
57	59	Jacksonville, Fla.	5,033	930	191	511	224	232	1,381	421	241	469	433
70	60	Providence, R.I.	4,943	1,009	212	583	283	205	923	383	232	449	663
56	61	Albany-Schenectady-Troy, N.Y.	4,941	1,128	176	513	285	233	1,019	352	219	413	603
88	62	New Haven-Meriden, Conn.	4,895	1,036	141	590	296	239	964	351	218	454	606
53	63	Birmingham, Ala.	4,803	1,034	176	516	364	249	1,213	327	216	367	342
47	64	Louisville, Ky-Ind.	4,772	1,080	203	627	244	58	1,167	458	252	546	137
58	65	Honolulu	4,663	797	327	710	324	167	641	302	109	831	455
69	66	Raleigh-Durham-Chapel Hill, N.C.	4,491	905	158	566	244	266	1,036	279	234	417	386
60	67	Tulsa, Okla.	4,097	814	73	452	247	240	1,160	237	236	366	273
81	68	Las Vegas, Nev.	4,092	809	145	504	220	213	942	303	211	438	308
73	69	Toledo, O.	4,014	810	156	655	153	187	840	410	127	421	254
72	70	Omaha, Neb.-Ia.	3,963	732	124	506	181	270	917	346	233	399	254
62	71	Scranton-Wilkes Barre, Pa.	3,831	855	152	515	193	137	733	268	182	323	473
79	72	Harrisburg-Lebanon-Carlisle, Pa.	3,813	810	119	447	142	163	815	339	176	304	499
66	73	Allentown-Bethlehem, Pa.	3,790	789	111	467	169	156	834	295	153	308	507
67	74	Akron, O.	3,668	827	123	458	138	135	759	360	223	386	259
68	75	Grand Rapids, Mich.	3,634	558	82	602	207	225	890	263	190	321	296
74	76	Oxnard-Ventura, Cal.	3,612	773	147	467	141	157	927	252	171	301	275
76	77	Knoxville, Tenn.	3,570	731	106	422	175	178	790	303	201	384	280
77	78	Tucson, Ariz.	3,545	748	137	469	143	202	836	243	171	358	239
65	79	Syracuse, N.Y.	3,513	835	170	355	212	172	783	212	157	322	294
75	80	Greenville-Spartanburg-Asheville, N.C.-S.C.	3,383	747	113	391	177	180	711	287	216	278	283
78	81	Fresno, Cal.	3,369	698	188	399	151	187	785	236	165	291	268
86	82	Springfield, Mass.	3,336	698	111	388	177	147	653	255	176	318	414
93	83	Lake County, Ill.	3,220	492	129	286	170	157	1,102	237	154	260	233
89	84	Little Rock-North Little Rock, Ark.	3,159	568	71	428	198	153	879	227	166	237	234
83	85	Wilmington, Del.-N.J.-Md.	3,139	598	109	429	153	167	690	286	128	251	327
94	86	Albuquerque, N.M.	3,136	598	79	358	156	191	817	199	182	329	227
84	87	Baton Rouge, La.	3,087	682	95	433	140	192	703	192	216	252	182
71	88	Gary-Hammond, Ind.	3,014	651	148	360	139	128	602	318	128	316	224
87	89	Youngstown-Warren, O.	2,818	590	95	464	117	130	538	288	118	258	218
99	90	Flint, Mich.	2,743	449	107	485	124	136	700	204	127	260	150
98	91	Wichita, Kan.	2,719	479	59	393	133	140	694	182	197	250	193
85	92	Tacoma, Wash.	2,680	525	90	334	102	128	607	214	197	272	209
82	93	El Paso, Tex.	2,629	497	56	406	175	167	622	159	128	240	180
90	94	Charleston, S.C.	2,598	572	67	287	135	145	646	181	146	252	166
91	95	Bakersfield, Cal.	2,541	575	102	243	99	128	557	257	140	255	185
97	96	Columbia, S.C.	2,459	458	68	324	126	120	571	224	139	227	201
92	97	Mobile, Ala.	2,457	570	98	314	94	118	580	183	138	199	164
80	98	Jersey City, N.J.	2,392	632	82	114	224	125	392	178	82	189	373
100	99	Chattanooga, Tenn.-Ga.	2,358	542	62	287	114	115	541	229	101	184	182
96	100	Johnson City-Kingsport-Bristol, Tenn.-Va.	2,197	482	70	283	96	95	583	127	133	163	165

NOTES: Dollars in millions
Source: Marketing Economics Institute

MEI

est state fair), Bank One Marathon, and Memorial Tournament, a golf tournament organized by Columbus native Jack Nicklaus.

With the death of Scripps Howard's *Citizen-Journal* at the end of 1985 when the JOA broke up between the city's two papers, the locally-owned *Dispatch* has increased daily circulation 18.5% to 248,121 and Sunday 2.7% to 371,489. The tv market is led by WBNS-TV (CBS), with an 8.5 rating, 28 share, but in hot pursuit is WCMH-TV (NBC), at 8.2/27. ABC affiliate, WTVN-TV, trails at 6.4/21. Rankings are from A.C. Nielsen's May report.

RANK **12**

Dallas

Big D

($ in thousands)

1985 vital statistics

Population	2,311,700
Disposable income	$33,429,648

Economic woes of the state's depressed oil industry have tested Dallas' success-oriented mindset and entrepreneurial spirit this year. And although some serious economic difficulties have touched the area, the economy and outlook remain buoyed by the area's diversity.

"Over the past six years, the Southwest and particularly Texas has been sort of an economic nirvana," says Howard Davis, president and ceo of Tracy-Locke advertising agency. "I think there was a perspective that we would continue forever unscathed by economic vagaries."

Not so in 1986. Dallas' real estate and banking industries suffered heavy losses during the year. Earnings of the area's largest bank holding companies plunged because of heavy losses in energy and real estate portfolios. The foreclosure rate skyrocketed. Office towers were left vacant; home values were depressed.

Bernard Weinstein, director of the Center for Enterprising at the Edwin L. Cox School of Business at SMU, says the area has experienced a "huge withdrawal of purchasing power" in the past year when per capita personal income grew 5.1%, less than the 7.2% rate of increase in 1985.

That, he says, is reflected in lower retail sales, which triggers a ripple effect for advertisers and agencies.

Dallas sales tax receipts fell by almost 6% in the first half of 1986, putting unexpected stresses on the city's budget, which, in turn, forced temporary cutbacks in some city services.

Residential real estate sales have been closing at an average of 22% below asking prices, three times the spread between asking and closing prices the year before, real estate sources report.

And perhaps reflecting an undercurrent of economic stresses among some groups, major crime in Dallas has risen steadily over the past two years, with an over-all 22% increase being registered for September, 1986, compared with the previous September.

During the same 12-month period, petitions for protection under the bankruptcy act rose 51%. In sharp contrast, the number of bankruptcy filings in the district in 1980 totaled 1,848. Nonetheless, the area's unemployment rate, projected by Mr. Weinstein to end the year with an average 5.1% for the fourth quarter, is the second lowest in the state, which was consistently recording unemployment rates of about 9%.

Despite a 2.6% growth rate in 1986, somewhat less than the 3% recorded in 1985, Dallas' population remained relatively young—still one of the area's major attractions for major national marketers. The area's median age in 1985 was 29.9, according to a Sales and Marketing Management survey that also reported the 18-34 age group to be 32.7% of the Dallas PMSA.

Dallas' two major daily newspapers saw the ripples appear in their ad linage figures, which have been soft for the year. By the end of the nine-month period ended Sept. 30, the sluggish economy in particular had taken its toll on the market's No. 2 newspaper, the *Dallas Times Herald*, which was purchased from Times Mirror Corp. by William Dean Singleton and his Media News Group. Media Records reflects that for that period the *News* had a 56.6% share of the market's total daily linage, up from 54.4% in the same period the year before. The *News*' total Sunday linage represented a 58.6% share, up from 57.1% in the comparable period of 1985. The figures include a 54.8% share of total retail for the *News*, and a 56.3% share of total general linage, both up from 52.6% and 54.7%, respectively.

Jeremy Halbreich, *Morning News* executive vp, attributes some of the softness to the psychological impact of reading about the state's over-all depressing economic situation spurred by the plunge in crude oil prices.

In tv, Times Mirror-owned KDFW-TV (CBS) led the charts with a 7.4 rating, 21 share, just edging out A.H. Belo's No. 2 WFAA (ABC) at 7.3/20. KXAS (NBC) was not far off at 7/19. The Dallas market has strong indies, led by KTVT, 3.6/10, and KTXA, 2.5/7. Figures are sign on to sign off from A.C. Nielsen's May report. KVIL-FM and KKDA-FM are the two lead radio stations in that order in a very competitive market.

Tracy-Locke's Mr. Davis says, "There has been a general tendency to say 'the sky is falling' when you read about Houston. We forget that [in Dallas] we've had many, many years of incredible vitality, and nothing lasts forever.' "

The Dallas agency outlook was particularly bright in contrast to the outlook in Houston where one Houston agency chief says under the cloak of anonymity that the competition to keep one's clients is so stiff that, "There are no [business] principles in Houston, now. Anything goes. Incumbents are doing all they can do to hold on. Any loss would be devastating."

The general outlook in Dallas, however, is far from bleak. The National Planning Assn. projects that between the years 1985 and 2000, Dallas will record the eighth largest increase in the number of new jobs to be created among larger cities.

Perceived as a problem by some and as an opportunity by others, the city's commercial building vacancy levels have remained high, reflecting in September a downtown office vacancy level of 20.4%, the fifth highest such rate in the nation.

RANK **49**

Dayton-Springfield, O.

Gem City

($ in thousands)

1985 vital statistics

Population	931,100
Disposable income	$10,797,022

Transportation has been a driving force in the Greater Dayton-Springfield area since the beginning of the century. The area gave the world the Wright Brothers, man's first powered flight, and the first man on the moon, Neil Armstrong, whose boyhood home is just 40 miles to the north.

Besides being the bread and butter of the work force of almost 500,000, transportation influences what tourist trade the area has. In addition to the National Air Force Museum, the oldest and largest military aviation museum in the world, the area boasts the Dayton International Air Show. This four-day event in late July is rivaled only by the Paris Air Show in attracting flying buffs and exhibitors.

October, 1986, saw the opening of I-675, the $715 million, 26-mile roadway connecting I-70 on the east with I-75 on the south. This interstate highway was proposed a quarter of a century ago as a north-south beltway around Dayton. The roadway opened just in time to coincide with the reopening of a 15-mile stretch of I-75 through downtown Dayton that had been under reconstruction for more than three years. Locals jokingly referred to Dayton as the orange construction barrel capital of the world, after the ubiquitous squat lane barriers.

The highway already is an economic catalyst for the area. This is borne out by more than $100 million in commercial-industry developments that already have sprung up along it.

The small suburban city of Fairborn, population 28,000, which sits between Dayton and Springfield and is trisected by I-675, I-70, and I-75, issued $25 million dollars of construction in the first nine months of 1986, adding to its economic base largely defined by Wright-Patterson Air Force Base, confined within its city limits. The base is the area's largest employer with civilian and military employment of 33,000. It also has attracted the large amount of hi-tech and aerospace businesses that have located along I-675.

Dayton-Springfield's rebound from the depressed conditions of the late '70s—its current 7.5% unemployment rate is half the levels reached during the height of the depressed period—also is traced to General Motors' reopening of its truck and diesel engine plant in south Dayton.

In Springfield, Navistar (formerly International Harvester) gave the area a shot in the arm by keeping its truck manufacturing plant there. Honda Motor Co., which has its large plant in Marysville outside of Columbus, added a huge distribution center on I-75. The first engine recently rolled off Honda's motor assembly plant near Anna, O., 20 miles up I-75.

While construction and development has been expanding, media has constricted. Cox Enterprises merged the *Dayton Daily News* and the *Journal Herald* in September. To appease irate readers, the two papers asked them to vote on which specific features from the morning *Journal* and the afternoon *Daily News* would be kept. But when all the votes were in and the merger complete, almost all features had been kept. All that had been accomplished was publishing one single edition in both the morning and afternoon, although the Saturday afternoon edition was dropped.

WHIO-TV (CBS) dominates the tv market with 9.4 rating, 31 share, and Dayton's other local vhf affiliate, WDIN-TV (ABC) is second at 6.4/21, according to A.C. Nielsen's May report covering sign on to sign off. The NBC affiliate, WKEF-TV, a uhf station, is third at 4.8/16.

Two uhf indies, WRGT: "The Wright One," and WXIX-TV, and PBS station WPTD, Oxford, the Miami University station, fill out the tv market. Three cable companies serve the area, promising to make things interesting after the first of the year when the deregulation of that industry goes into effect. In radio, WHIO-FM was far out in front of No. 2 WGTZ-FM in the Arbitron spring sweeps.

Springfield is served by one daily newspaper, the *News Sun*, also a Cox Enterprise paper, and two am and two fm radio stations. Springfield area residents receive all tv and radio stations from Dayton as well as from Columbus, 45 miles to the northeast.

Downtown Dayton is undergoing a city-backed rebuilding. The turn-of-the-century Arcade Square recently was turned into a below-ground food court topped by a four-story glass dome. Surrounding office buildings are under construction. Just across Third Street is Courthouse Square, the focal point of which is the restored Montgomery County Courthouse upon whose steps both Abraham Lincoln and John F. Kennedy pleaded their cases to Daytonians.

President Ronald Reagan borrowed a page out of the history books when he jetted into nearby Wright-Patterson Air Force Base, traveled by motorcade to Courthouse Square, spoke to Daytonians from the same steps, and then left by train to tour Ohio counties during his successful campaign in 1984.

RANK **26**

Denver

Mile High City

($ in thousands)

1985 vital statistics

Population	1,614,000
Disposable income	$23,730,731

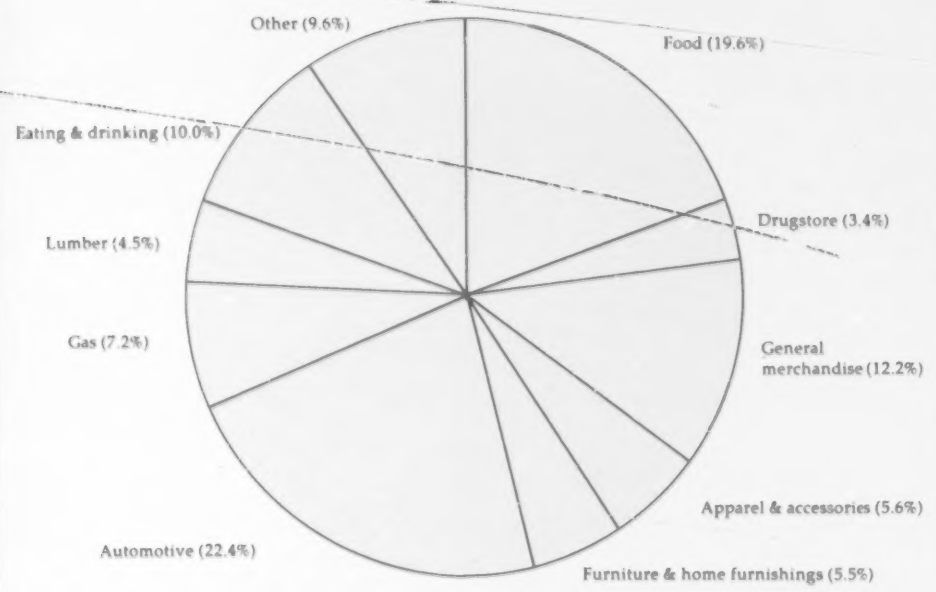
Denver, a petroleum center in a state that remains a net importer of oil, is not as strapped financially as cities like Dallas and Houston, which are reeling from the impact of the slump in oil prices. The city's diversified economy has further enabled Denver to escape much of the budget crunching forced upon other oil-producing areas.

Gains for Denver's growth are increasingly tied to the city's burgeoning service sector, particularly in such areas as tourism, high technology, public construction and retail trade. Manufacturing, mining and agriculture are troubled spots.

The state's normally sunny employment picture took a sharp dive this fall when the now-defunct Frontier Airlines laid off some 3,000 workers in the metro area. Unemployment in the state, which usually is below the national average, in the first nine months of this year rose to the national average of 7%, up from the 5.9% Colorado recorded in 1985.

Most of the strong job gains through mid-1986 centered on such service industries as amusements, lodging, business services and healthcare. For 1987

Total retail sales by category



Total retail sales in top 100 markets % U.S. sales

Category	Sales in top 100 markets 1985	1982	% chng	Total U.S. retail sales 1985	1982	% chng	Top 100 markets % U.S. 1985	1982	% chng
Food	$170,148	$152,559	11.5	$281,430	$252,802	11.3	60.5	60.3	0.2
Drugstores	29,873	22,414	33.3	47,371	35,849	32.1	63.1	62.5	0.9
General merchandise	105,895	88,396	19.8	160,558	131,282	22.3	66.0	67.3	(2.0)
Apparel & accessories	48,754	33,991	43.4	71,898	51,991	38.3	67.8	65.4	3.7
Furniture	47,907	29,816	60.7	70,596	46,513	51.8	67.9	64.1	5.9
Automotive stores	194,858	109,405	78.1	310,001	182,390	70.0	62.9	60.0	4.8
Gasoline stations	62,491	60,021	4.1	102,731	104,633	(1.8)	60.8	57.4	6.0
Lumber & hardware	39,461	31,516	25.2	72,948	48,975	49.0	54.1	64.4	(15.9)
Eating & drinking	86,758	70,494	23.1	130,334	107,357	21.4	66.6	65.7	1.4
Other	83,747	66,898	25.2	129,997	113,887	14.1	64.4	58.7	9.7
TOTAL	869,892	665,509	30.7	1,377,866	1,075,679	28.1	63.1	61.9	2.0

NOTE: Dollars in millions.
Source: Marketing Economics Institute.

MEI

United Banks of Colorado Inc. is projecting an increase of about 3% in employment. Inflation, a byproduct of employment, is expected to remain below the national average as it has since 1984. For 1987, the bank holding company predicts inflation will average 3.4% in the Denver-Boulder area.

The Colorado ski industry purported its fourth consecutive record season in 1985-86 with 9.12 million skier visits, up 0.9% from the previous season. The state's some 30 resorts have also had to redouble their marketing and advertising efforts as the aging baby boom population tightens the market. More than $130 million was spent on ski area improvements in 1985-86.

Colorado's high technology companies, while battered by a low dollar and foreign competition, also are expected to fuel some of the growth in the coming year. Hi-tech, represented by some 1,100 companies statewide, comprises about 3.3% of employment.

Several large public construction projects are either being planned or seeking support. Among the projects, the most expensive and controversial is a new international airport to replace the aging Stapleton International Airport. Mayor Fredrico Pena's administration, which has lobbied hard for the $1.5 billion airport, estimates that the project can be completed by the mid-1990s if started in 1987. This coming spring, Denverites will vote to annex land for the new airport.

Construction contract has been awarded for a $110 million convention center but debate still rages in city council as the city searches for additional revenue sources for funding and revenue sharing. A section of the C-470 highway, which will connect the major north/south I-25 interstate to I-70, also is planned.

However, Denver's downtown office vacancy problem continues to worsen. A recent study by Coldwell Banker places the downtown office vacancy rate at 29.3%, the highest in the nation. Overbuilding and an exodus of many oil and gas firms have been blamed for much of the problem, which some experts predict will take at least five years to absorb.

Retail centers also are overbuilt, with a report by Frederick Ross & Co., placing the vacancy rate at an all-time high of 12.8%. To combat the retail glut, many developers have begun a scramble to locate and attract a strong national anchor. The upscale Cherry Creek shopping center, located in growing southeast Denver, will get a Saks Fifth Avenue store in 1987.

Denver-based Realties Inc., which is developing the Broadway Plaza project near I-25 and South Broadway, is bringing the Paris-based retailer Printemps in to anchor its International Collections retail center.

Retail sales growth, while remaining on a par with the nation in 1985, is expected to surge at least 5% in 1987, partly as a result of increased tourism.

But while Denver retailers continue to compete, the city's cultural institutions are experiencing their own financial woes as they struggle for a limited pool of funds. Save for a last-minute bailout by Mayor Pena in October, the Denver Symphony Orchestra would have played its last concert, as declining attendance and funds contributed to its near-bankruptcy.

Denver is served by two competing morning dailies, the *Rocky Mountain News* (daily circulation, 295,922) and the *Denver Post* (daily circulation, 203,755). The *Post*, however, claims a Sunday lead with circulation of 373,244 to the *News'* 330,258, according to Sept. 30, 1986, ABC FAS-FAX reports. In addition to the dailies, the Metro Denver area is served by eight tv stations. Ratings and market share for leading tv stations: KUSA, ABC, 7.6/23; in hot pursuit is KCNC, NBC, 7.2/22; and last is KMGH, CBS, 5.4/17. Figures are sign on to sign off from A.C. Nielsen's May report.

There are 30 radio stations, the first five rankings going to fm stations with KOSI-FM outdistancing the others for the top spot, according to the Arbitron spring sweeps. KOA and sister station, KOAQ-FM, were recently put up for sale by owner A.H. Belo Corp., Dallas. KOA is the closest am station to the top, ranking No. 6 in the sweeps.

Scripps Howard sold in September its *Rocky Mountain Business Journal*, a weekly business tabloid, to Kansas City-based American City Business Journals.

RANK **5**

Detroit

Motor City

($ in thousands)

1985 vital statistics

Population	4,318,600
Disposable income	$53,257,841

Syndicated columnist Bob Greene made headlines in Detroit when he "confessed" that his visits to Motor City had become a guilty pleasure. Among the favorite things about the southeastern Michigan city situated between Lakes Huron and Erie, Mr. Greene said he liked the dailies, the tv stations and Tiger Stadium.

Such comments were delicious pleasure to Detroiters in an era when it has become fashionable to knock the city usually by citing the high crime rate in the center core (actually Flint, Mich., to the north has a higher crime rate).

The local media Mr. Greene admires are going through several changes including ownership, divestiture and ongoing circulation wars.

The Gannett-owned *Detroit News* and the Knight-Ridder-owned *Detroit Free Press* are preparing for a JOA pending approval of the Justice Department. Gannett acquired the Evening News Assn. earlier this year in a transaction that ended ownership by the Scripps family dating back to 1873. The *Free Press* declared itself a failing newspaper in papers filed for the JOA.

Broadcasting properties are up for grabs. ABC-owned and operated WXYZ-TV, No. 2 in the market with a 9.1 rating, 24 share, was sold to Scripps Howard Broadcasting as part of the Capital Cities takeover of ABC. Capital Cities, which owned WJR/WHYT am, fm, also sold off ABC's WRIF-FM to Detroit-based Silver Star Communications to meet FCC multiple ownership requirements. WWJ/WJOI am, fm were put on the block as part of Gannett's purchase of the ENA and sold to a group of Detroit-area businessmen, including former RKO president Robert Williamson. WJBK-TV, the CBS affiliate owned by Storer, ranked No. 3 at 7.2/19. The top station is WDIV (NBC), at 10.2/27, according to A.C. Nielsen's May report for sign on to sign off.

Unlike some downtowns with commercial and residential use, Detroit tended to bedroom community concepts early on in its growth and the suburban sprawl continues with malls and stores that ring the central city. But, as the city recovers from the depression of the early '80s, retailers are starting to look at Detroit as a viable market for their expansion.

The new retail growth is just part of over-all redevelopment taking place. Chrysler, for example, has announced it will refurbish and redevelop its Jefferson Ave. plant, which employs nearly 5,000 of its 38,000 area workers. First phase construction, to include a paint facility for trucks, might be ready by January.

Much of the downtown development has come during the tenure of Democratic Mayor Coleman Young, a black who has forged a strong coalition of blacks and whites, the latter including such "royalty" as Henry Ford II, Ford Motor Co. chairman and driving force behind development of the Renaissance Center, industrialist Max Fisher (who struck his original fortune in the oil business) and Al Taubman, the real estate-shopping center tycoon who recently bought Sotheby's and made an unsuccessful bid to purchase Pulitzer Publishing Co. of St. Louis (*St. Louis Post-Dispatch*).

The typical Detroiter commutes 51.3 minutes between home and office on expressways clogged most mornings and evenings. The city ranks No. 3 in the nation in passenger car expenditures, well ahead of cities with larger populations (it is No. 5), according to SRDS. Contributing to this ranking is the city's lack of a people-moving system, although one is in the works.

The long drive time augurs well for the radio market and out-of-home advertising. Detroiters listen to radio an average of 24.6 hours a week, placing the market in a tie for ninth in radio listenership in the nation, according to Radio Advertising Bureau. Radio stations provide heavy sponsorship of programing breaks for commuters, from ad sponsorship of traffic reports, time checks, news and sports updates and the like. Competition in radio is heightened also by formats: There are seven adult contemporary stations, one classical and five black. WJR, an am station with a monopoly on sports in this sports-crazed time, is the overwhelming leader in the market, according to Arbitron's spring sweeps.

Top marketers in the area include the car companies: General Motors, Chrysler, Ford, American Motors, Volkswagen of America; the computer company, Burroughs; Domino's Pizza (in nearby Ann Arbor); the No. 2 U.S. retailer, K mart; the No. 3 brewer, Stroh Brewery, and industrial concerns including Ex-Cell-O, Budd Co., Fruehauf, Federal Mogul and Masco.

As white-collar employment continues to rise and Detroit diversifies with robotics and other hi-tech areas, the city has become less a slave to the cyclical nature of the auto industry, although a poor year in the industry still is felt throughout the Detroit economy, as when Chrysler nearly went under and other U.S. automakers struggled in the early 1980s.

Unemployment rate in the seven-county Detroit metro area stood at 7.6% in August, 1986, based on total employment of 1,979,000, compared with a 9.6% rate in August, 1985.

RANK **41**

Fort Lauderdale Hollywood-Pompano Beach

Venice East

($ in thousands)

1985 vital statistics

Population	1,125,200
Disposable income	$16,486,938

"How sweet it is," says Jackie Gleason, one of Fort Lauderdale's most celebrated citizens. And he should know. About one in four residents of the county he lives in is 65 and older, which should make Mr. Gleason, 70, feel right at home. Another 57% of the area's population falls between the ages of 18-64 and 20% is under 17.

Besides Mr. Gleason, Fort Lauderdale is most known for Spring Break, which draws 400,000 college students from February-April. With those numbers, it is not surprising the area supports at least 3,091 restaurants and 583 hotels and motels with far more opening or planning to open.

Fort Lauderdale, considered a Miami stepchild, is a burgeoning dichotomy, with large pockets of elderly ex-Northerners on the one hand running the condominiums with their powerful voting blocks, and the yuppies on the other, many of whom live in new communities such as Weston or Coral Springs to the west.

Of all U.S. cities, Fort Lauderdale has one of the lowest number of single family homes, 49%, which owes to the fact that the area is second in the nation in number of condos, 32%. Fort Lauderdale is also third in the country for having the fewest number of homes built before 1949. An average home costs $92,100.

Geographically, the city boasts so many canals off the Intracoastal Waterway, it is frequently referred to as "Venice East." One of the largest boating shows in the world is held here in November, when the rest of the country is warming up for winter.

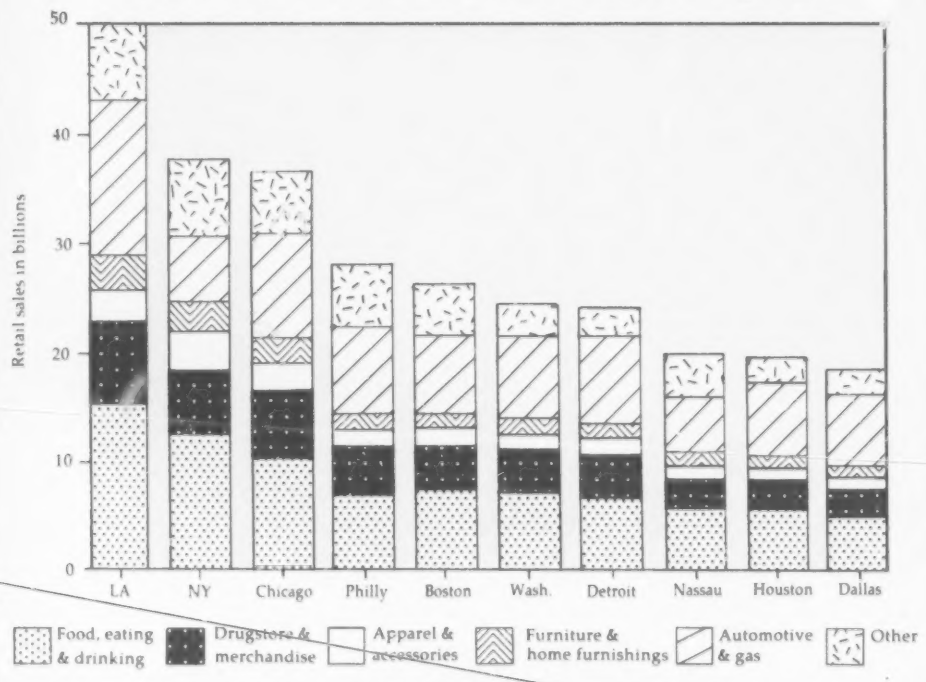
Perhaps the largest business development is the continuing expansion of the Fort Lauderdale-Hollywood International Airport and its close proximity to burgeoning and also expanding Port Everglades. One of the busiest air traffic routes in the country is Fort Lauderdale-New York, because of its heavy flock of snowbirds.

Real estate is an enormous industry with new shopping centers and housing communities opening nearly every weekend. At least two ad agencies in the county specialize in real estate, and the Saturday edition of the *Fort Lauderdale News & Sun-Sentinel* boasts the largest real estate section in the country. The morning *Sun-Sentinel* (circulation 125,259) and the evening *Fort Lauderdale News* (66,785), are both owned by Tribune Co., Chicago. The two link up for the Saturday real estate prize, with total circulation of 185,576, according to ABC FAS-FAX reports for Sept. 30, 1986.

The *Miami Herald* has heavily eaten away at the paper's market by publishing a separate Broward edition. *Herald* circulation in Broward County is 101,550. Scripps Howard daily, *Hollywood Sun-Tattler*, (circulation, 34,095), also is supported by locals. Miami/Fort Lauderdale lies in the same 14th ADI, and all the network affiliates have begun Broward bureaus or have Broward news teams.

Fort Lauderdale has a growing skyline with the addition of a new museum of art, a new library, sleek new office towers such as Two Financial Plaza, the Barnett Bank Plaza and First Fort Lauderdale Place. And it continues to grow. By the end of the decade, the city will have a $33 million

Top 10 retail sales markets by category



Top 10 markets in 1985 by retail sales

Rank	Market	Total sales	'85-'82 % chng	Eating/ drinking	Drugs/ mdse	Apparel/ access.	Furniture	Auto/ gas	Other
1	Los Angeles-Long Beach	$49,883	26.3	$15,168	$7,694	$2,718	$3,122	$14,531	$6,650
2	New York	37,741	30.0	12,592	5,653	3,588	2,676	6,143	7,089
3	Chicago	36,500	24.0	10,227	6,166	2,756	2,051	9,761	5,538
4	Philadelphia, Pa.-N.J.	28,060	31.8	6,953	4,390	1,666	1,351	7,989	5,710
5	Boston	26,341	31.9	7,581	3,790	1,711	1,334	7,193	4,732
6	Washington D.C.-Md.-Va.	24,461	37.2	7,144	3,973	1,452	1,500	7,416	2,976
7	Detroit	24,041	22.6	6,748	3,969	1,489	1,251	7,920	2,664
8	Nassau-Suffolk, N.Y.	19,893	24.8	5,703	2,743	1,266	1,298	4,886	3,997
9	Houston	19,679	3.3	5,635	2,777	1,129	1,053	6,676	2,409
10	Dallas	18,452	52.4	5,070	2,502	1,044	1,041	6,417	2,376

NOTE: Dollars in millions.
Source: Marketing Economics Institute.

MEI

Performing Arts Center. But as with most cities, downtown parking is a continuing problem.

The county spends an estimated $900,000 a year on economic development through its private Committee of 100, an affiliate of the Broward Economic Development Board.

Gold Coast Graphics moved from Dade to Broward earlier this year, taking 300 jobs and a $5 million annual payroll because of Dade's refusal to grant the printer tax free revenue bonds. Other companies, such as Racal-Milgo Inc. and Hector Turf Inc. also abandoned Dade for Broward.

Broward's largest public companies are Pantry Pride of Florida, Development Corp. of America and Atlantic Federal Savings Bank. The top employers are Broward County School Board, 12,488; Broward County government, 6,600; and Winn Dixie, 3,400. Major corporations such as Westinghouse, Gould and American Express built plants west of Fort Lauderdale when land was dirt cheap, regulation was nonexistent and family-oriented communities could be developed to attract employes.

Though sandwiched between two cities known for high crime, Miami and West Palm Beach, Fort Lauderdale has managed to escape the serious criminal element. Residents seem most disturbed by deaths of spring breakers who fall from hotel balconies. Last year, because of the deaths and other activities police relate to alcohol consumption, the city toughened up its drinking and public lewdness laws and built a wall around the Fort Lauderdale "Strip." Many students rebelled by driving 45 minutes south to Miami Beach. Still, locals know better than to even attempt a trip to the beach during what they call "the enemy invasion."

Broward is the second most expensive Florida county to live behind the Florida Keys (Monroe County), according to the Governor's Office of Planning and Budget. An average annual income for a resident of Fort Lauderdale is $36,655. The area's population grew an estimated 10.5% from 1980-85, to 1.1 million.

RANK **39**

Fort Worth-Arlington, Tex.

Cow Town

($ in thousands)

1985 vital statistics

Population	1,199,900
Disposable income	$16,804,151

Fort Worth-Arlington in north central Texas is one of the nation's prime growth areas. Population has increased 23.3% in five years. For the five year period, 1983-88, the metro area is ranked as the third fastest growth area of the top 50 metropolitan areas, according to *Sales & Marketing Management's*, "1988 Metro Market Projections."

Fort Worth has weathered the oil crisis better than most. Texas is wrestling with a $3.5 billion revenue shortfall and record unemployment. Mayor Bob Bolen boasted in October that despite proposed fiscal 1987 spending increase of 7.1%, Fort Worth will be the only major city in Texas not to increase property taxes this year. In the first quarter, employment in Fort Worth stood at 6.8%, up from 6% recorded one year earlier, but still below state and national rates.

The city's labor force is still growing, but not all displaced workers have found jobs. Hometown companies like Gearhart Industries and Western Co. of North America are shrinking. Kendavis Industries, a huge privately-owned oil service company, is in involuntary bankruptcy.

Within the last two years, Fort Worth has attracted new industries employing 2,100, while American Airlines and other hometown employers are together hiring 5,350 new workers. There is plenty of office space. Downtown vacancy still languishes at 22%.

Fort Worth's economy is diversifying into aerospace manufacturing, livestock marketing, food production and electronics. The area's largest employers: General Dynamics-Fort Worth Division, 23,500 employed locally; American Airlines, 9,000; Bell Helicopter, 7,600; Tandy Corp., 6,500; General Motors CPC Arlington Plant, 3,000; Gearhart Industries, 900.

In its heyday, Fort Worth was a mustering point for Chisholm Trail cattle drives to Kansas. It was Cowtown, repleat with saloons, brothels, gambling dens, Butch Cassidy and Wyatt Earp, not exactly a modern-day image. To shake off this trail dust, Fort Worth Corp., a business consortium formed in the early 1980s, launched a $500,000 nationwide publicity campaign last fall themed "Fort Worth, Welcome Home."

Though Fort Worth never was a boomtown, it is ironically succeeding now. Streets aren't crowded nor city services strained. Land prices, while rising, are reasonable.

The North Side is getting a $50 million facelift, including the restoration of the Cowtown Coliseum. Downtown includes a rebricked Main St. and the recently renovated shops and galleries known as Sundance Square.

Fort Worth has no income tax, corporate tax, estate or inheritance taxes. More than 40% of the population is 20 to 44-year-olds and 74.8% white. The city is served by one daily newspaper, the *Fort Worth Star-Telegram*, and spillover from the two Dallas dailies.

The area, included with Dallas as the 9th ranked DMA by A.C. Nielsen, has the NBC affiliate, KXAS-TV, and two indies, KTVT and KTXA, the latter two wresting a very high 6.1 rating, 17 share from the total market, according to Nielsen's May report.

Arlington, halfway between Dallas and Fort Worth, was just a sleepy little town until General Motors opened its plant there in 1952. Today, Arlington is at the heart of the nine-county area known as the Metroplex.

It is the third largest city in north central Texas. Population is expected to hit 291,000 in 1990, up 14%. Unemployment is 4.6%. It is served by one daily, *Arlington Daily News*.

Although enhanced by proximity to Dallas, Fort Worth and the D/FW International Airport, the city has a solid economic foundation of its own. Tourism is one of city's most important industries—it hosted more than 4 million visitors last year, most coming to theme park, Six Flags Over Texas, the state's No. 1 man-made tourist spot.

The city opened its convention center in 1985; new hotels followed. During 1986, four new hotels added 756 rooms, giving the market 5,000 rooms.

Within the city limits is a General Motors assembly plant and the Great Southwest Industrial District, a 14,000-acre tract encompassing 350 companies employing 12,000 people.

Arlington has some of the lowest taxes in the country, and has no corporate or personal income tax. Average age is 29.7; population is 92.8% white.

In October, the city became a first, not by choice but out of necessity, when it began insuring itself for liability through the sale of $9 million in taxable bonds. Arlington's program makes it the first such self-insurance program in the country.

RANK **7**

Houston

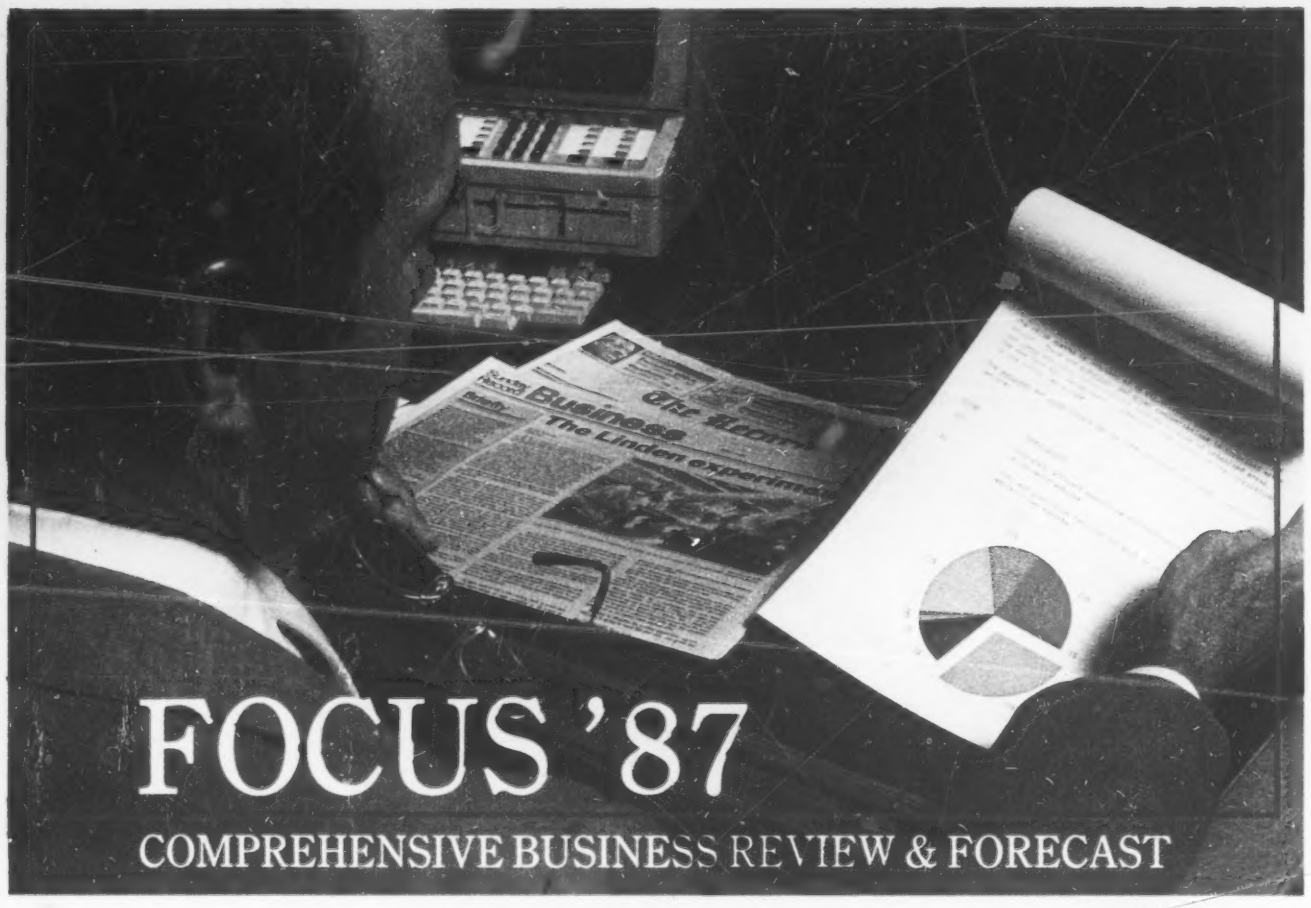
Bayou City

($ in thousands)

1985 vital statistics

Population	3,221,700
Disposable income	$42,900,795

we are a big city and you don't shut a big city down," proclaims Don



FOCUS '87

COMPREHENSIVE BUSINESS REVIEW & FORECAST

Timed to help you grapple with economic uncertainty, and plan for the impact of tax law revisions...

A COMPREHENSIVE VIEW OF THE FINANCIAL FUTURE

For reliable, astute information on business and financial prospects in 1987, corporate decision makers, investors, and consumers will turn to Focus '87 for a comprehensive review of 1986, and a preview of the trends and issues that will shape their business and financial planning during the months ahead. This is one of The Record's most eagerly awaited business sections of the year, and one that is most likely to be retained for future reference.

A SOUND ADVERTISING INVESTMENT

Focus '87 appears in The Sunday Record, when readers can spend more time leisurely absorbing this comprehensive issue...and more time reading your advertisement. It reaches 516,300 adults in affluent Bergen and Passaic counties, where 61 percent of all professionals and managers reported reading The Sunday Record in the past week. Among these readers are the executives involved in the selection and/or purchase of financial services, advertising media or telecommunications systems, plus executives involved in site selection for conventions and meetings, or in buying business electronics and other equipment. This elite readership makes Focus an ideal environment for business and financial advertisers, as well as those that provide services for business executives. The Sunday Record delivers more than three times the readership of The New York Times and almost four-and-a-half times the readership of The Newark Star-Ledger in affluent Bergen/Passaic counties, the #9 market in the country in median household Effective Buying Income.

Advertising deadline: January 13, 1987

Call for more information on space, color, and the impact of your advertising message among top corporate decision makers and wealthy investors.

The Record

150 River Street, Hackensack, N.J. 07601 / 201-646-4200
1350 Route 23, Wayne, N.J. 07470 / 201-628-6183

Sources: S&MM Survey of Buying Power, 1986
The Scarborough Report, 1986

SUNDAY, JANUARY 25, 1987

Brown, president of local ad agency Taylor Brown & Barnhill. Mr. Brown along with many other local executives view Houston's economic woes as part of the normal growing pains of a young city that achieved success perhaps too soon and too easily.

Now the ripple effect of depressed crude oil prices, covered extensively by the national media, cannot be denied by even the most ardent Houston boosters. But the city is fighting back on nearly all fronts.

From the Houston Astros to the local committee determined to sell the city as the perfect site for the 1988 Democratic Convention, efforts are being made to market the positive side of a troubled economy.

A citywide ad campaign called "Houston Proud" was instigated by Mr. Brown's agency last February as a means to urge Houstonians to take pride in their city. Largely a volunteer effort and backed by the Houston Economic Development Council, the campaign has generated enthusiasm locally but some snickers nationally for its questionable grammar and marketing value.

The *Dallas Morning News* gave front page coverage of comedian Gary Somberg's "Houston Poor" takeoff of the "Proud" campaign. Mr. Somberg is selling a "Houston Poor" starter kit for $16, which warns, "If you can afford this kit, you may not qualify."

It is difficult, however, for this city that is celebrating its 150th birthday to find humor in a high unemployment rate of 10.5%, record foreclosures, depressed retail sales, widespread layoffs and sizable office, apartment and hotel vacancy rates.

Economic indicators are not encouraging—particularly because of record growth the city experienced from 1974 to 1982 that makes slight gains seem instead like failure. The boom of the '70s has made the bust of the '80s seem even worse.

Houston still remains a relatively affluent market. According to *Sales & Marketing Management*, 1985 average household income after taxes was 15% greater in the Houston Metropolitan area than the country as a whole.

Further, Houston is still a young city with a 1985 median age of 29.2 years compared with the U.S. median age of 31.9 years.

What characterizes Houston now is how the market is adjusting to a major financial crisis spawned by the energy recession.

For some, like long-time retailer Sakowitz here, it has meant filing for Chapter 11 bankruptcy protection. Local advertisers, ad agencies and media are naturally feeling the pinch.

Retail ad budgets understandably are flat to down while industrial accounts are by and large inactive, according to local sources. Businesses that go beyond the Texas market are faring better than those with purely local reach. In virtually all areas there is belt-tightening.

Young & Rubicam pulled out of this market last summer when it sold its Houston agency Rives, Smith, Baldwin & Carlberg/Y&R to Chuck Carlberg and a group of local investors. D'Arcy Masius Benton & Bowles will leave the market by yearend.

Ad revenues and linage at competing dailies, *Houston Chronicle* and *Houston Post*, are down. The *Chronicle* leads in a total average paid weekday circulation of 425,434 compared with the *Post's* weekday plus Saturday circulation of 316,209, according to each paper's publisher's statements for the six months ending March 31, 1986.

The local magazine scene is in what one local ad exec calls a "shambles." The chamber in October gave up its 50-year-old business monthly, *Houston Magazine*, citing poor ad revenues. Similarly, the short-lived *Houstonian Magazine*, formerly *Houston Style*, ceased publishing after two years of targeting an upscale market. Southwest Media Corp., Dallas, is negotiating the sale of *Houston City Magazine* to the magazine's publisher, Lute Harmon.

Houston Home & Garden, owned by Communications International, N.Y., in partnership with Meredith Publishing, projects 1986 ad pages will fall about 14% from 1985.

Capital Cities/ABC's o&o station, KTRK-TV, continues to be the dominant station in a market in which indies claim a combined 10.3 rating, 26 share from sign on to sign off, according to A.C. Nielsen's May report.

Houston's moderate climate promotes an almost year-round outdoor lifestyle. "There are a lot of parks and open spaces," observes Richard Jaffe, president of Telesurveys of Texas, a social/market research company. "The outdoor aspect means that people are not locked up with the tube in the winter. And people have more time to spend with their children here because they can live near their workplace."

While Houston's population growth has slowed compared to the '70s, the Hispanic market is expected to be the fastest growing ethnic market for the next two to three decades, according to Mr. Jaffe. Its Hispanic market is 7th largest nationally, with 700,000 people according to the 1985 U.S. Census.

RANK
38

Indianapolis

Crossroads of America

($ in thousands)

1985 vital statistics

Population	1,203,100
Disposable income	$14,262,143

Native son Kurt Vonnegut Jr. once described Indianapolis as "the world's largest city not on a navigable waterway." However, a lack of ports didn't prevent the city from developing into a shipping hub. During the heyday of the railway system Indianapolis became the crossroads of America, a position it retains today during the heyday of the interstate highway system. The convergent point of four interstates, Indianapolis is within a day's drive for two-thirds of the nation's population.

More people have been coming in recent years, and more have been staying. Between 1980 and 1984, the population of the eight-county MSA increased by 3.1% to 1,203,100, and employment rose by 18.7%. During that same period the median household income rose to $12,997 from $10,050 in 1980; more than 20,000 new housing units were built; and 1,000 new businesses opened.

The mood of the city is upbeat: That's especially apparent in the downtown area known as the Mile Square. Over the past decade $1 billion has been spent on downtown development, with another $800 million worth of projects scheduled for completion by 1990. In the past year alone construction has started on six major downtown structures.

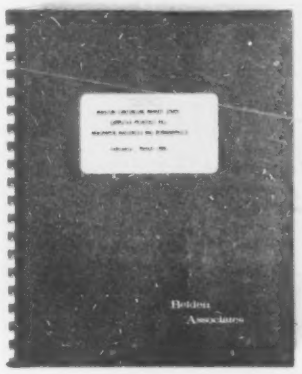
All of this activity translates into an unemployment rate of only 6.3%. Although the closing of Western Electric in 1985 and the recent curtailment of RCA's videodisc production have dealt the blue collar sector unwelcome blows, the environment for enterprising entrepreneurs is healthy. Author John Naisbitt lists Indianapolis among the 10 best places in the country to start a new business.

Except for a newspaper. The Pulliam family dominates the dailies, owning both the Indianapolis morning *Star* and evening *News*. For decades these have been the only dailies in town. The upshot of this lack of competition is a lack of the sort of excitement generated by media friction found in other markets. Though ostensibly there's competition for circulation (the *Star* boasts a daily lead of some 100,000 copies), the papers share building space and ad rates, reducing the competition to numbers signifying nothing.

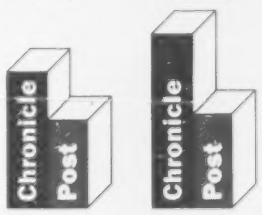
In the publication field the more interesting story is the on-going battle for circulation figures and advertising dol-

WHAT DO THREE BRAND NEW STUDIES SAY ABOUT THE CHRONICLE'S LEAD IN HOUSTON?

OVERWHELMING.

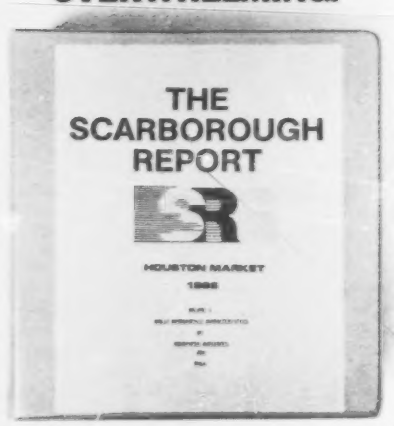


The Chronicle leads by:
28% Daily 47% Sunday

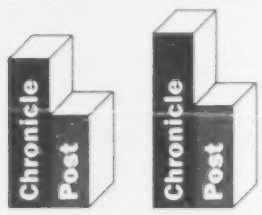


1986 Belden Study
Conducted February–March, 1986

OVERWHELMING.

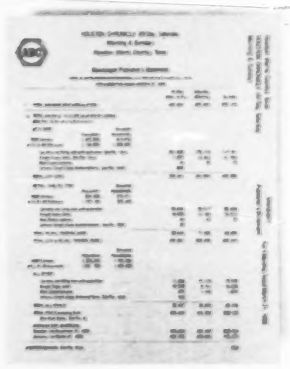


The Chronicle leads by:
32% Daily 42% Sunday

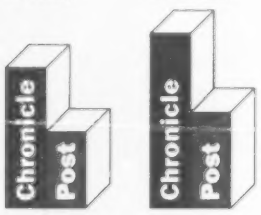


1986 Scarborough Report
Conducted April–July, 1986

OVERWHELMING.



The Chronicle leads by:
37% Daily 45% Sunday



Publisher's Statements
March 31, 1986

How far ahead *is* The Chronicle?

According to the newest Belden study, conducted February thru March, 1986, The Chronicle's lead is 28% daily, 47% Sunday.

But what does the Scarborough Report say? Conducted April thru July, 1986, it puts The Chronicle lead at 32% daily, 42% Sunday.

And how about the Publisher's Statements? Dated March 31, 1986, they show The Chronicle is ahead 37% daily and 45% Sunday.

So it's not a question of whether The Chronicle is leading in Houston. We are–no if's, and's or but's. It's only a matter of *how much* the lead is.

And according to three different studies, The Chronicle leads by an average of 32% daily, and 45% Sunday.

By comparison, when our competitor boasts of being Houston's best-read newspaper, did you know their data is two years old? It's true. They're quoting figures from a Simmons-Scarborough study whose data was gathered in 1984, and released in 1985.

But what really counts is how the numbers add up *this year*, in 1986. And you can look at three different studies, all reflecting the same, single fact: The Chronicle has an overwhelming lead over the competition.

For more information on why The Chronicle is Houston's most powerful, cost-efficient buy, phone Joycelyn Marek, Research Manager, collect at (713) 220-7401.

Houston Chronicle
Houston's primary advertising investment

SOURCES: 1986 Belden Continuing Market Study, Houston P.M.S.A. The 1986 Scarborough Report, Houston Market. Calculations computed by The Chronicle from the March 31, 1986 Publisher's Statements for The Houston Chronicle and The Houston Post (City and RTZ). Represented by Sawyer Ferguson Walker.

lars between the two city magazines—*Indianapolis Monthly* and *Indianapolis Magazine*. Both claim a monthly circulation of 20,000 plus, with the *Monthly* often holding a slight edge.

Activity among the tv stations has been less dramatic. The three network affiliates are tightly bunched between 6.6 and 6.0 ratings and 22 and 20 shares. Drama, if any, followed the two indies. WTTV-TV was sold to Lorimar-Telepictures, and WXIN-TV (formerly WPDS-TV) was sold to Outlet Communications.

The radio market hasn't been much more dynamic, though the sale of public station WIAN-FM, owned and operated by the Indianapolis Public School System, raised some eyebrows when public tv outlet WFYI's bid of $100,000 won out over Butler University's $1 million offer. The official explanation had to do with preserving the public interest. Butler already operates a non-commercial station, WAJC-FM, seemed to be the gist. Reverberations from the sale were heard in the press for weeks.

Among commercial stations, Detroit-based Booth American Co. purchased WZPL-FM from Midwestern Communications Ltd. for $13 million. That follows the sale earlier this year of WIRE/WXTZ am/fm by Mid-America Radio Inc., to WIN Communications Inc. of Indiana.

With an average daily commute of 47 minutes, the morning and evening drive time slots are important. And because public transportation is limited to 230 Metro buses, a large percentage of the nearly 676,000 registered cars clog the freeways during peak hours. That translates into ad gold for WIBC-AM and WFBQ-FM, top stations in Arbitron's spring sweeps.

The advertising event in the city—and one of the most important in the country—is the Indianapolis 500. All local media offer race packages to advertisers. With coverage of the 500 starting in early May and lasting through Memorial Day, it's an event that offers plenty of exposure.

However, 1987 will offer another, potentially larger, ad opportunity, albeit a one-time deal: The Pan American Games, to be staged in Indianapolis Aug. 7-23, and nationally telecasted by CBS. So far corporate sponsors such as Eli Lilly & Co., Mayflower Corp., Marsh Supermarkets, Merchants National Bank, and Indianapolis Newspapers Inc. (the *Star* and the *News*) have pledged between $500,000 and $2 million each to be involved.

The games will mark another peak in the city's effort to be recognized as an amateur sports capital. But sports are not the only game in town—there is also a substantial effort being made to attract more convention business to Indianapolis. The $80 million Hoosier Dome is the link between the sports world and the convention business, serving as both a 61,000-seat venue for spectator events and a huge exhibition hall for conventions.

RANK **28**

Kansas City, Mo.-Kan.

Heart of America

($ in thousands)

1985 vital statistics

Population	1,493,900
Disposable income	$19,406,472

When speaking of Kansas City in a national forum, one must debunk some myths. For one, Kansas City is not just in Kansas. The posher bedroom communities are on the Kansas side, but the bigger city is in Missouri. The nation's 28th largest metro area, variously defined by federal and local agencies, covers seven to 10 counties and is about evenly divided on both sides of the state line. It is a sprawling, straddling piece of geography at the center of the U.S.

Kansas City is not flat and dusty, but hilly with tree-lined streets. The dust in the area is kicked up from the record $1.2 billion worth of commercial and residential construction sites that blossomed during the first three quarters this year.

Despite the sour agricultural economy, the city that sits at the center of the nation's breadbasket has seen about $6 billion worth of commercial construction in the last three years. The construction boom—most noticeable in a reviving downtown office tower boomlet and burgeoning suburban office parks—appears to be tapering off this year, but residential unit starts are at record pace—the most since "F.W. Dodge Reports" began monitoring the scene in 1978.

A strong service economy is coupled with big-employer production of automobiles and trucks (two General Motors assembly plants and one of Ford's) and greeting cards (thanks to home-based Hallmark Cards, the city's civic-minded corporate giant).

Top 10 markets in 1985 by index of retail sales to disposable income

Rank	Market	Retail sales	Disposable income	Index
1	Las Vegas, Nev.	$4,092	$6,417	131
2	Knoxville, Tenn.	3,570	5,756	127
3	El Paso, Tex.	2,629	4,320	125
4	Orlando, Fla.	6,576	10,870	124
5	Albuquerque, N.M.	3,136	5,252	122
(t)	San Antonio, Tex.	7,637	12,819	122
7	Chattanooga, Tenn.	2,348	3,996	121
8	Memphis, Tenn.-Ark.-Miss.	5,789	9,905	120
(t)	Little Rock-North Little Rock, Ark.	3,159	3,401	120
10	Charleston, S.C.	2,598	4,501	118

NOTE: Dollars in millions. Index determined by dividing market's percentage of U.S. retail sales by its percentage of U.S income.
Source: Marketing Economics Institute. MEI

An unemployment rate of about 4.8% earlier this year—consistently at least two points under the national average—helps keep the Kansas City consumer in the malls. Additionally, total personal income is rising at a 4-5.5% rate this year with expectations of a 5.2% annual growth rate in 1987, according to the Mid-America Regional Council.

Belden Associates market surveys for the *Kansas City Star* show that 77% of the seven-county metro area households have annual incomes of $15,000 or more. The $50,000 and above household income segment, which accounts for 12% of the market, is the fastest growing; it jumped 37% between the 1983 and 1985 Belden surveys.

The city has a per capita effective buying income of $12,581 and an average household EBI of $33,302. The workforce is 44% white collar. Forty-eight per cent attended or graduated from college; another 37% are high school graduates. Nearly 85% of the population is white; 13% black and 2% "other," primarily Hispanic.

Vast underground limestone caves, dry and temperate year-round, cement the area's reputation as a distribution center by providing the nation's largest underground storage facilities.

Kansas City International Airport, home to Trans World Airlines' maintenance and overhaul base, has never come close to capacity in terms of passenger traffic. Last year it handled 7.2 million passengers and nearly 33 tons of air cargo, with more than 400 daily airline operations. KCI's largest gate user, Eastern Air Lines, which has KCI's only flight hub operations, this year scaled back expansion plans that would have included a new reservations center, because of financial woes.

Thirty-nine per cent of the workforce hold jobs outside their county of residence, with 62,000 Kansans working in Missouri and 33,000 Missourians commuting to Kansas. Government (the city is a federal regional center) is the area's largest employer. The biggest private-sector employers, each with a payroll of 5,000 or more, are Allied Bendix Aerospace, GM, Hallmark, TWA, the University of Kansas Medical Center, and Yellow Freight System Inc.

The much-ballyhooed quality of life gets its reputation from the Nelson-Atkins Museum of Art, the State Ballet of Missouri, the Lyric Opera and 35 live theater groups. The biggest regional drawing cards on the sports circuit are Kansas City Royals baseball, which attracts more than 2 million fans a year despite the club being in the smallest market of any major league team, and Kansas City Chiefs football. Worlds of Fun and Oceans of Fun, two theme parks north of downtown, draw family vacationers in the summer.

Year-round, the big regional draws are the city's suburban shopping malls and the upscale Country Club Plaza, a Spanish-style shopping and entertainment district in midtown Kansas City that decorates itself with miles of outdoor lights each Christmas season.

Kansas City is served by three vhf network tv affiliates and four uhf stations (two indies, one PBS and one Christian). KMBC-TV (ABC) leads the rankings with a 7.1 rating and 26 share, according to A.C. Nielsen's May reports. Most of the metro area has cable tv access. There are 13 am and 17 fm stations, the top nine of which are tightly bunched behind leader KMBZ-AM. Dominant dailies are the morning *Kansas City Times* and evening *Star*, both owned by Capital Cities/ABC. There are three suburban dailies; one biweekly; four weeklies (two of them minority) and many neighborhood papers.

RANK **2**

Los Angeles-Long Beach, Cal.

City of Angels

($ in thousands)

1985 vital statistics

Population	8,108,700
Disposable income	$105,842,422

"Economically speaking, it can be said that the sun is now rising in the west," observes California Governor George Deukmejian. Support for such a statement lies oceanward: U.S. trade with its Pacific neighbors, spearheaded by the adjoining Los Angeles and Long Beach ports, surpassed trade with its traditional European allies in 1982; by the year 2000, California will rank as the world's fourth largest economic power in its own right.

The Los Angeles-Long Beach metropolitan statistical area, the nation's second largest, consists of 8.1 million residents who have an average household income of $38,200, or more buying power than anyone but the most well-heeled New Yorkers.

Arriving to attend to their whims and contest with the likes of Bank of America, Security Pacific and the nation's largest savings and loans for this country's second-largest consumer deposit base, are 173 non-California banks, 126 of them foreign-based.

Just a few blocks from the Pacific Stock Exchange's gleaming new trading floor in downtown Los Angeles rises the city's most recent, and in some ways most powerful, addition to an increasingly impressive skyline, the 41-story Citicorp Center. Even old money brokerages from Wall Street like First Boston and Morgan Stanley & Co. are flocking to the coast.

What makes the tilt West particularly significant is that it will grow more pronounced with time.

Sixty per cent of the world's population now lives in the Pacific region. And while the first Japanese arrived here in the 1880s to build the West's railways, Japan's three largest automakers Toyota, Nissan and Honda, have since established U.S. headquarters within a few miles of each other in a coastal plain where Japanese farmers operated plant nurseries before World War II.

Because foreign travelers spend over $3.5 billion a year in California, and with a 27-story, 550,000-sq.-ft. World Trade Center under construction in Long Beach, the sense of globalism is growing.

California's international trade surged from $2.6 billion in 1960 to in excess of $94 billion in 1985, over 80% of which was with Pacific Rim nations. The Los Angeles Customs District is growing rapidly as intermodalism, the combination of ships, trains and trucks to transport heavy goods, transforms San Pedro Bay from a regional harbor into an international gateway.

With plans by 2020 to add 2,600 acres of fill to the bay at a cost of $4 billion, the congestion problem that arrived in tandem with increased trade should ease, enabling the Port of Los Angeles to build upon its position as the nation's most profitable port, and the Port of Long Beach as the nation's busiest.

Yet if international commerce is Southern California's future, it by no means dominates the present. Five major retailers-May Department Stores, Carter Hawley Hale, Associated Dry Goods, Federated Department Stores and Nordstrom vie for the nation's second-largest retail market, a lap of riches that support over 610,000 retail employes in all.

Aerospace giants such as Hughes

THE AVERAGE ANNUAL FAMILY INCOME OF DIARIO LAS AMERICAS READERS IS $28,050.

Read all about it. Ask for Diario Las Américas' Reader Profile.

Diario Las Américas

The Spanish-language Daily Newspaper
Founded July 4, 1953

Diario Las Américas
2900 N.W. 39th Street
Miami, Florida 33142-5193

(305) 633-3341

Represented nationally by:
Cresmer, Woodward, O'Mara & Ormsbee, Inc. (CWO&O)

Aircraft, Northrop Corp., Rockwell International and TRW power the Pentagon while employing another 305,000 Angelenos. In addition, most of the largest oil companies have drilling or refinery operations nearby.

Southern California is best known as the nation's entertainment capital. But with so many changes in the last year among its film barons and media magnates, there are wires crossed from Beverly Hills to Hollywood and back.

Ted Turner now owns MGM/UA, or at least what used to be before Kirk Kerkorian bought back parts of United Artists. Lorimar has merged with Telepictures, changing its name to Lorimar-Telepictures but not many of the faces.

And then there are many new faces at Columbia, Fox, Paramount and Walt Disney Productions.

Press lord, Rupert Murdoch, once thought to be a potential successor to the Hearsts at the Los Angeles *Herald-Examiner*, has since declared he's giving up newspaper acquisitions to establish a fourth television network, centering on indie KTTV-TV in Los Angeles, acquired from Metromedia Inc.

Similarly, Jack Kent Cooke came home from Washington D.C., to acquire the Los Angeles *Daily News*, a suburban daily, from Tribune Co., Chicago, which has decided it wants to establish its own fourth network, beginning with Los Angeles indie KTLA-TV. The markets seven indies make it tough on the affiliates, siphoning off a composite 15.1 rating points and a 41 share, according to A.C. Nielsen's May reports. KNBC-TV and KABC-TV are in a virtual dead heat for the top spot with 7.1 and 7.0 ratings, respectively, and 19 shares.

Adding spice to the variety of life is the fight of some Hispanic interests to retain control of KMEX-TV, the Spanish-language station in Los Angeles that SIN Television Network was forced to divest under an FCC ruling.

Hispanics now constitute over 20% of California's population. Los Angeles is considered home to more Mexicans than anywhere but Mexico City while Asians are about 8% of the population total and blacks about 7.5%.

RANK **47**

Louisville, Ky-Ind.

Derby Town

($ in thousands)

1985 vital statistics

Population	954,300
Disposable income	$10,525,008

For a while this year, Louisville was "Dallas." Or so it seemed, at least, as the story of the rich and powerful Binghams and their intra-family rivalry had its run on network tv news, "60 Minutes" and "Donahue," on National Public Radio and in newspapers and magazines of every ilk everywhere.

That drama is now over and the dissolution of the local communications conglomerate complete. The jewel among the media properties, the daily newspapers, the *Courier-Journal* and *Louisville Times*, went to Gannett for an estimated $300 million.

The former Bingham tv and radio properties are market leaders. WHAS-TV, a CBS affiliate sold to Providence Journal Co. for $85.8 million, is virtually tied with WAVE-TV (NBC) for the top tv spot in the market, with 30 share points each, according to A.C. Nielsen's May reports.

WHAS-AM and WAMZ-FM sister stations, sold to Clear Channel Communications of San Antonio for $20.1 million, dominate as No. 1 and 2, respectively, in the radio market, according to Arbitron's spring sweeps.

While the operations and much of the management of these companies have remained basically intact since the sales, change is inevitable. Even before Barry Bingham Sr. put the properties on the market, the newspapers had undergone a significant change when the two separate news staffs were combined for economic reasons. The betting is that Gannett will make an even greater economic move by folding the afternoon *Times*.

Metro Louisville, with a population approaching one million, knows all too well the story of economic moves, especially when told by manufacturers. In early 1970s, for example, manufacturing jobs accounted for nearly 40% of the area's work force. That percentage is down to about 24%. Production workers here still churn out appliances at the General Electric plant, the area's largest employer, Ford trucks, Philip Morris cigarets and liquor products at Brown-Forman, but the heyday is over.

Yet, the area's unemployment picture is not all that gloomy. In July of this year, in fact, it stood at 6.8%, the lowest since March, 1980. The gains, naturally, have been in the service and trade areas. For the MSA, which consists of four counties in Kentucky (Jefferson, Bullitt, Oldham and Shelby) and three in Southern Indiana (Floyd, Clark and Harrison), service jobs in the 1974-1986 period have increased 57% to 91,700. Retail/wholesale trade employment during the period rose to 103,900, up 27.6%. However, as a Metro Louisville United Way study notes, the jobs being created have lower wage scales than the jobs that have been lost. That perhaps explains why the area's per capita and average household effective buying incomes (EBIs) are lower than the national averages. For metro Louisville, the per capita EBI is $10,516 while the U.S. average is $10,813; the Louisville household EBI is $28,827 and the national average, $29,640.

Besides the fundamental change in the work force composition, other national trends, such as a graying population, more working women and more single-parent families, are evident in the United Way study. For example, in 1970 nearly 30% of the area's population was in the 14-and-under category with 9% in the over 65 age range; by 1985, the younger group had declined to 22.6% while the over-65 increased to 11.1%.

The number of women in the metro Louisville work force grew by 17.7% while male employment dropped 3.8% from 1970 to 1982 (the latest data available). In addition, the number of female-headed households with children increased 86.5% in the same period. Children in single-parent families, in stepfamilies or living with other relatives account for 55.3% of all children in the metro Louisville area.

When the terms healthcare and Louisville are linked, the name Humana generally pops to mind. Now a diversified healthcare giant with annual revenues approaching $3 billion, Humana owns and operates 86 hospitals in 21 states and three foreign countries. It is Louisville's fifth largest employer with 5,000 employes.

The face of Main Street is due for another change soon with construction of two office towers by the Webb-Silliman Development Co. on property that has been cleared for development and is vacant except for two older buildings.

A recent study by Louisville Central Area, a non-profit planning group, indicates that the downtown will be ready for additional office space. The study says that in the past two years, more than 1 million sq. ft. of office space has been built or created through renovation and another 1 million sq. ft. is under construction or renovation.

While much of the building and restoration of downtown Louisville in recent years have been on the southern edge, the area nearest the river—the northern fringe of the downtown—is starting to get attention. Phase one of the so-called "Broadway Renaissance" has been completed there, with subsequent phases consisting of a residential complex and additional commercial and retail space.

THE ONLY CHART SHOWING SAN JOSE BELOW SAN FRANCISCO.

Three charts showing it higher:

% of ADI Population[1]	
Santa Clara County	25%
San Francisco County	12%

% of $35M + Incomes[2]	
Santa Clara County	27%
San Francisco County	11%

Santa Clara County Sunday Newspaper Readership[3]	
Mercury News	62%
San Francisco Chronicle/Examiner	11%

Santa Clara County is obviously the best buy in the Bay Area. And the best way to buy it is the San Jose Mercury News. It's the leading newspaper in the market. It's five times more popular than the San Francisco papers. It's even more popular than television. It's simply that good.

THE SAN JOSE MERCURY NEWS

The Bay Area's Best Buy.

Represented by Knight Ridder Newspaper Sales, Inc.

[1] Sales & Marketing Management, 1985 [2] San Jose Continuing Market Study, Belden Assoc., 1985

Memphis, Tenn. Ark.-Miss.

RANK 48

Bluff City

($ in thousands)

1985 vital statistics

Population	944,700
Disposable income	$9,904,773

During the 1970s Memphis suffered a lack of cooperation between business and government, lingering division between the races, absence of an over-all plan for community growth, and a series of obsolete plant closings in manufacturing industries, such as Firestone and International Harvester. Economic news was consistently dismal.

That has changed. The turnaround began in 1979 when Tennessee Gov. Lamar Alexander conceived and organized the Memphis Jobs Conference, a community forum for economic study, planning and action. During the pivotal years of jobs conference activity (1980-81) specific goals for growth were defined and adopted, racial issues addressed, and the nucleus for a business-government partnership formed.

According to a recent economic report, titled "Memphis: Tennessee's New Growth City," released by First Tennessee Bank, the state's largest, since 1983, Memphis' employment growth of 10.1% has passed the 9.1% of both Tennessee and the nation. Unemployment has remained at a stable 6.6% over the past year.

Memphis is the 10th largest distribution center in the nation. Distribution industries, centered on homegrown Federal Express, are booming, creating almost 5,000 new jobs in 1985. During a 30-day period in 1986, seven national firms announced a move of major distribution facilities to the city, including Music Corp. of America (MCA), GTE/Sylvania, Wearever-Proctor-Silex, Munsingwear and Bucyrus-Erie.

Memphis International Airport has become America's 16th busiest, moving into the "large hub" category reserved for those airports which enplane at least 1% of the total domestic air travelers in the nation (5.5 million in the year ending in July, 1986). A large expansion of the airport is under way to accommodate a new wave of traffic generated by the merger of Northwest Orient and Republic airlines and to satisfy the continued growth needs of Federal Express. This includes facilities to accommodate Northwest's wide-bodied aircraft.

The city's telecommunications plant is one of the largest in the nation because of its central location, the sophisticated networks of Federal Express, Holiday Corp. and others. More 800-number calls go in and out of Memphis than any city in the south.

Medical industries now account for 9% of Memphis' total employment. And as a result of recent city, county, state and corporate commitments, more than $200 million will be poured into medical research and teaching facilities over the next five years. Included are such institutions as St. Jude Children's Research Hospital and the University of Tennessee, Memphis.

Memphis ranks within the top 10 cities in the south having corporate offices of companies with sales in excess of $1 billion, and 200 of the Fortune 500 now have operating facilities in the city. The most recent coup, International Paper's operating headquarters from New York, was won over 18 other competing cities.

Tourism, through such attractions as Elvis Presley's Graceland mansion, the annual Memphis in May International Festival, Mud Island and Beale St. where the blues began, has become big business. Tourism revenues hit $850 million in 1985, a 14% increase over the previous year. The Convention and Visitors Bureau's "Start Something Great in Memphis" campaign is paying off. The bureau has an annual budget of $1.5 million.

The vacancy rate for all multi-family housing in Memphis/Shelby County is estimated at 7.1%, up from a rate of 4.8% last year. There is an abundance of choice office space available because of low interest rates and tax advantages for downtown developers.

Memphis is served by only one daily newspaper, the *Commercial Appeal*, a Scripps Howard property. But Memphians in increasing numbers depend on *USA Today* for a broader coverage of national news. Numerous weeklies service the area.

The weekly *Memphis Business Journal* is considered by many to be a second newspaper. With a circulation of 10,000, the *MBJ* had a 50% increase in ad revenues in the past year.

The city magazine, *Memphis*, with a circulation of 25,000, has had a 20% increase in ad revenues since May, 1985, when it was rescued from threatened bankruptcy by a group of investors headed by the publisher of the *MBJ*.

The market is served by 26 radio stations. The top five are fm, with WHRK-FM far out in front as No. 1, according to Arbitron's spring sweeps. Tv is represented by all three networks with WMC-TV (NBC) with a 9.4 rating and 28 share, and WREG-TV (CBS), 8.9/26, dominating the ratings, according to A.C. Nielsen's May reports. There are two indies and a PBS station. A full-service cable system also serves the area.

Retail sales for the year ending in July were up 6.9% over the previous year, attributed to rising employment and aggressive marketing by retailers, with complete stocks to meet consumer demand. The slogan of Schawb's Dry Goods Store, a Beale St. merchant offering everything from voodoo potions to clerical collars, sums it up: "If you can't find it here, you're better off without it."

Highest unemployment rates among 100 leading markets

Rank	Market	Unemployment rate Sept. '86	Aug. '86	Sept. '85
1	El Paso, Tex.	13.5	11.6	10.5
2	Gary-Hammond, Ind.	13.2	13.3	10.6
3	Flint, Mich.	12.0	10.6	12.2
4	Bakersfield, Cal.	10.9	11.2	11.5
5	New Orleans	10.8	10.6	11.0
6	Houston	10.5	10.6	8.0
7	Youngstown-Warren, O.	10.5	10.9	11.0
8	Baton Rouge, La.	10.1	10.2	10.8
9	Toledo, O.	8.7	8.8	8.0
10	Birmingham, Ala.	8.6	9.0	6.6

Source: U.S. Department of Labor, Bureau of Labor Statistics

Miami-Hialeah, Fla.

RANK 24

Magic City

($ in thousands)

1985 vital statistics

Population	1,753,100
Disposable income	$20,916,317

"Entering Miami often feels like leaving the country, or about as close to leaving the country as you can get while still being able to drink the water and watch David Letterman," says Jane Wallace, a reporter for CBS' "West 57th Street."

Miami was a sleepy resort town built around a railroad until the 1960s when Fidel Castro came to power and much of the Cuban middle class headed north across the Florida Straits. Entrepreneurial Cubans, and others, continue to transform the major source of revenue, tourism, into international business by linking the city with the whole of Latin America. Miami is already the biggest banking capital outside New York.

There are three cultures in Miami: Latin American, based in Little Havana; European-American and Jewish, based in Miami Beach; and black American, based in Overtown.

Of the 1.7 million Miami metro population, Latins make up 41%, non-Hispanic whites 40% and blacks 19%. After Los Angeles and New York, Miami is the third largest Hispanic area of the country. Cubans constitute a majority of Hispanics and represent the wealthiest Hispanic group in the U.S.

There are 25,000 Latin-owned businesses in the county, from mom-and-pop groceries to huge New York Stock Exchange companies. In certain communities, such as Hialeah, Hispanics outnumber Anglos 3-1.

In addition to Cubans, exiles from virtually every country in Central and South America live in Miami. There is a 60,000-plus Haitian contingent, which has given way to a Northeast Miami community called Little Haiti.

When Castro emptied Cuban prisons at the Port of Mariel and sent detainees to Miami in 1980, Miami's crime rate soared. Still the city has tried—but has not very well succeeded—to shed its image as a dangerous place to live. The city is considered the second-most dangerous metropolitan area in the country, beaten out only by New York.

Many wealthy Latin Americans and northern snowbirds maintain winter residences in Miami, so it is not surprising that Miami, at 50%, is ranked among cities with the lowest percentage of single-family homes. An average home costs $86,900. However, the city is seventh in the nation in number of condominiums, 14%, and fifth in the nation in most apartments, 30%. Apartment rentals average $375 per month, with prices brought down by elderly Miami Beach apartment dwellers on fixed incomes.

Because of the transient nature of the city, Miami has one of the 10 busiest airports in the country, with one of the busiest routes: New York-Miami. Earlier this year, the city opened Metromover, a 1.9-mile above-ground subway that runs from Dadeland, one of the busiest shopping malls in the Southeast, to Hialeah, for a $1 fare. Miami has tried to upgrade its bus system; nevertheless, most residents drive to work using major thoroughfares I-96 and Palmetto Expressway. The average commuting time is 52 minutes.

Miami is a giant banking and commerce center. Some 350 international banks and multinational corporations have offices in the city. More than 125 of the Fortune 500 companies have branches or main offices here, including Knight-Ridder and International Business Machines. About 2.5 million sq. ft. of new office space, most of it occupied by financial institutions dealing with Central and South America, have been constructed in downtown Miami since 1984.

The largest employer in the county is Dade County schools with 30,000 employes, followed by Metro-Dade County government with 23,000 employes.

Miami supports the morning *Miami Herald*, 442,560 circulation, considered one of the best newspapers in the country; the Spanish daily, *Diario Las Americas*, 68,800 circulation; the evening *Miami News*, 60,137 circulation; and the *South Dade News Leader*, 11,614 circulation. The *Miami Herald* publishes a section called "El Herald" that is included in newspapers in certain Hispanic Zip code areas.

While the *Miami News* covers only Dade County, the *Herald* tries to cover the tri-county South Florida area and has separate Broward and Palm Beach news bureaus and sections. The *Herald* competes heavily with the *Fort Lauderdale News* and *Sun-Sentinel* on Dade's northern border. The advertising and circulation wars between the two papers are legendary.

The city hosts three network affiliates, two Spanish language stations and countless cable stations. The CBS affiliate, WTVJ-TV, No. 3 in the market, changed hands in 1984, and a deal to sell the station again fell through in October, 1986, leaving the once-popular station internally unsettled. No. 1 station is WSVN-TV (NBC) with a 7.4 rating, 20 share, according to A.C. Nielsen's May report. Both Spanish stations are for sale. There are 32 English and seven Spanish-language radio stations in the Dade-Broward county area and many trade employes and deejays.

Middlesex-Somerset-Hunterdon, N.J.

RANK 50

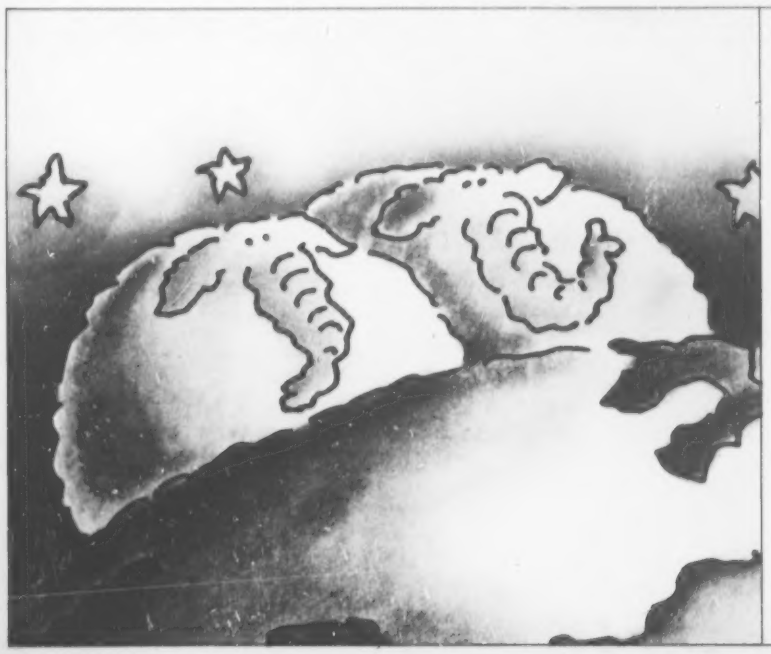
Central, N.J.

($ in thousands)

1985 vital statistics

Population	930,400
Disposable income	$14,713,524

The recent completion of Route 78 in Hunterdon County means Christine Whitman's husband comes home 45 minutes earlier each night. For the first time in recent memory, commuters along that route aren't sitting bumper



ARE YOU OVERLOOKING A MAMMOTH MARKET?

Seattle is the 14th largest CMSA in the country. A growing, affluent market that's easy to reach with our Jumbo Combo package.

Our low combination rate delivers two daily giants, The Seattle Times and Seattle Post-Intelligencer. Together, they cover 47% of the market daily and 56% on Sundays.

For details, contact your CWO&O representative. Find out how the Jumbo Combo can help put you on the map.

The Seattle Times

PUBLISHER OF The Seattle Times

REPRESENTING THE Seattle Post-Intelligencer

to bumper, twice each day.

But will this traffic break last? Mr. Whitman, director of the Somerset County Board of Chosen Freeholders, and others involved in planning the growth of the region highly doubt it. They expect at least five more years of the explosive growth which has transformed New Jersey's waistline Middlesex-Somerset-Hunterdon region in recent years from an area dominated by farms, quiet suburbs and undeveloped tracts to a hub of corporate activity, shopping malls, hotel-conference centers and political battles over land use.

Middlesex County, once the home of aging industries such as the Chevron Oil Co. refinery in Perth Amboy and the N.L. Industries titanium dioxide plant in Sayreville, has felt the brunt of the change, leaving some old-time residents baffled.

Somerset and Hunterdon counties, although less developed, are beginning to face many of the same problems—waste disposal, burgeoning school systems, lack of housing for the poor—as growth accelerates.

Demographic experts such as George Sternlieb, director of the Rutgers University Center for Urban Policy Research, attribute the region's phenomenal growth to location—between major highways such as the New Jersey Turnpike, Garden State Parkway and Routes 1 and 287 and proximity to Newark International Airport. The region also houses corporate magnets, such as Johnson & Johnson in New Brunswick, Merrill Lynch & Co. in Plainsboro and Exxon Corp. research and engineering offices in Clinton, along with Rutgers University in New Brunswick.

But the mass exodus of people and jobs to this region also illustrates the increasing desire to work near the home and a change, for many young families, in discovering the suburbs may have more attractions than the cities.

The nature of the area's population has changed almost as much as the landscape.

Middlesex County has recorded the largest population increase in the state, with 9,400 new residents added July 1, 1984-85, according to the most recent state department of labor figures. The greatest increases have occurred along the Route 1 corridor between New Brunswick and Trenton and in the key areas of Edison, East Brunswick, Old Bridge and Monroe-South Brunswick.

The heaviest growth in Somerset County has been in the Watchung-Raritan area and in the most developed municipality—Franklin Township. In Hunterdon County, the Clinton area has been mushrooming in growth, regional officials say, and the completion of Route 78 should spur further development.

For the three counties, a 3.8% jump in employment in the past year is because of an increase in service jobs and the phenomenal growth of the retail industry.

Residential growth has been just as astounding and property values have zoomed. In all three counties, property has gone up approximately 23% in the past year, according to a state treasurer's study, making the area one of the hottest real estate markets in the country.

Once the home of commuters and farmers, the region now is the fourth richest in the U.S., with a median effective buying income of $35,302, according to the *Sales & Marketing Management's* "Survey of Buying Power," in 1986. The median population age of 33 years, the youngest of any region in New Jersey, means more families with needs for municipal services and the retail trade.

The newspaper market has become competitive as the region has grown. The area is served by the *Central New Jersey Home News* in New Brunswick (daily circulation 58,994), the *Star-Ledger* in Newark (460,330 daily), the *Courier-News* in Bridgewater (49,779 daily), and many smaller dailies and weeklies. Circulation figures are from ABC's FAS-FAX Sept. 30, 1986.

The area gets its tv from New York, Philadelphia, and locally from WOR-TV. The area is heavily cabled with Storer Cable TV and TKR Cablevision, the primary operators. Cable also is a strong ad medium locally.

The key question for economists, local officials and residents is whether the region can sustain, and indeed wants to sustain, further growth. Rutgers' Mr. Sternlieb believes the expansion will continue for another half dozen years, but Joseph Seneca, chairman of the Governor's Economic Policy Council, worries that the shift from manufacturing companies to service industries may leave the region without a significant base.

One solution he sees is a change in the jurisdictional system now dominated by home rule to allow more broad-based planning. James Gilbert, chairman of the new state Planning Commission, says the state intends to take a more active role in determining the need for planning without choking off growth.

"Major growth," says Mr. Seneca, "should not become the goose that lays the golden egg—it should not change the region from an attractive place to work and live."

RANK
31

Milwaukee, Wis.

Beer Capital

($ in thousands)

1985 vital statistics

Population	1,378,600
Disposable income	$17,584,887

More than twice the number of furniture ads air annually on Milwaukee tv than in the average U.S. market. It's not because Milwaukeeans wear out their furniture faster than most, but because 75% of people here live in single-family homes or duplexes.

That trend, traced to a conservative, family-oriented culture, is changing. Permits for multi-family housing construction are up 72% this year, mostly on the northwest side in Oak Creek, Germantown, Menomonee Falls and Brown Deer.

Milwaukee's downtown area also is experiencing the first investment in downtown housing since the 1960s with the construction of Yankee Hill, a $30.8 million apartment and townhouse project, and a former Blatz Brewer, being quartered into apartments at a cost of $20 million. Both projects, to be completed in early 1987, will be for the more affluent Milwaukeeans.

The construction of downtown housing units is a small part of major redevelopment in the central city. Work has begun on the $100 million theater district, which will include three theaters, two cinemas, an office tower, retail space and a Windham Hotel. Construction is under way on the $40 million, 20,000-seat Bradley Center Sports Arena. Completion of both is set for early 1988. What was once a giant Schlitz Beer Brewery is being converted into offices, retail space and restaurants.

One big attraction to office space developers is the low vacancy rate downtown, estimated at 12%, well below the national average of 15.6%. Rents for prime space have escalated 25% during the past five years, however. If more development projects don't get off the ground soon, rents will begin to increase at a much higher rate by 1988, says a major realty exec.

To Milwaukeeans, one of the more exciting additions to downtown this year is the new Marshall Field's, the first upscale department store to land in Milwaukee. It has replaced the old Gimbels Store at the Grand Avenue Mall. Field's also has replaced Gimbels at the Northridge Shopping Center in northwest Milwaukee, and at the Southridge Shopping Center in Green-

ARIZONA'S HOT MARKET

TUCSON

We're 77th and moving up fast...

Tucson is one of the 10 fastest growing cities in the USA. Our current metro population of 635,000 is projected to top 1 million in less than 15 years. We're a sunbelt market with a future.

As the commercial hub for inhabitants of Southern Arizona and much of Northern Mexico, Tucson presents a lucrative marketplace for major business to thrive and grow.

Tucson's daily newspapers, **The Arizona Daily Star** and the **Tucson Citizen**, have a staggering five-weekday adult readership cume of 80%!* This readership is employed by solid growth industries of hi-tech manufacturing, tourism, and government/military.

Gain your foothold on this flourishing market with the advertising medium that supplies the market demand: **The Arizona Daily Star** and the **Tucson Citizen**.

*Tucson Newspaper Audience Study, Belden Associates, 1985

The Arizona Daily Star Tucson Citizen

Represented by Gannett Media Sales

Call Richard Lowe, National Advertising Manager, at (602)573-4420 or write for a copy of our comprehensive Tucson market book, **1986 Tucson Trends**. Send request to: Tucson Newspapers Inc., P.O. Box 26887, Tucson, AZ 85726-6887.

dale. Its Mayfair Mall store, in Wauwatosa, has been open since 1959.

According to a Field's exec, the success of the Wauwatosa store, and the lack of any other specialty department stores in Milwaukee were important reasons behind Fields' decision. The growth in household income was another factor. In 1980, median household income measured $11,272. This year, the median household earns $30,847. But Milwaukeeans aren't rushing out to spend their money. Despite the rise in income, the city has slipped in its national ranking for total sales. "If you can sell it in Milwaukee, you can sell anywhere," says the manager of the Northridge Shopping Center. He quickly adds that the market here is changing. "People are becoming more fashion conscious. They're buying more items based on wants rather than just needs. That means sales of luxury items are increasing." Northridge, Bayshore Mall in Glendale and the downtown Grand Avenue Mall are bringing in trendier, pricier stores such as Laura Ashley.

The increasing number of chic establishments, along with the revitalization of downtown is helping this city overcome a serious inferiority complex. The 1980 recession was a serious blow; there was a corporate exodus from Milwaukee for several years. Now, more companies are moving in than out, and the economy is showing signs of steady growth. Residents are feeling better about their city.

The self-image problem here is made worse by what is commonly a distorted perception of Milwaukee by outsiders. Many still think that this is where most domestic beer is made. While Pabst, Miller and Heileman do have breweries here, they are no longer the major employers. Manufacturing does remain an important sector of this economy. Manufacturing is 27% of the metro area, and services and finance, 53%.

Sports is a big item, and Milwaukee expects to get a boost from its NBA basketball team, the Milwaukee Bucks, this season. They are being billed as a title contender. The Greater Milwaukee Open officials are looking for a major sponsor for their golf tournament in 1987, and expect to strike a deal in January. They also are negotiation with a tv network interested in airing the tournament throughout the Midwest next summer.

The employe-owned Journal Co. dominates the city's media, owning the major newspaper, tv and am and fm stations. The evening *Milwaukee Journal* carries a daily circulation of 293,384, while the morning *Milwaukee Sentinel* circulates to 196,068, according to ABC FAS-FAX figure for Sept. 30, 1986. A.C. Nielsen ranks the city the 30th DMA. The NBC affiliate, WTMJ-TV, leads the nets with a 7.8 rating, 27 share, with WISN-TV (ABC) pulling a 6.7/23 for No. 2, according to Nielsen's May report. The am station, No. 1 WTMJ, outdistances its sister fm station, No. 2 WKTI-FM, in the radio market, according to Arbitron s spring sweeps.

RANK **13**

Minneapolis-St. Paul, Minn.-Wis.

Twin Cities

($ in thousands)

1985 vital statistics

Population	2,282,400
Disposable income	$32,052,975

The upscale Twin Cities area, famous for its lakes, icy winters and heated downtown skyways, has recently witnessed mild setbacks for hi-tech firms, a major airline merger, a development boom and increased media competition.

Layoffs at locally based Control Data Corp. and Honeywell shocked the Twin Cities, a metro expanse that is home to 2.26 million, as did Northwest Orient Airline's $884 million purchase of Republic Airlines in February —two locally based airlines.

Expanding retail sales and a building boom balanced the hi-tech slump. Retail activity increased 5.4% in the fourth quarter of 1985 from 1984, the most recent data available.

The skyline of Minneapolis, nicknamed the "Minneapple," has filled out noticeably. The latest planned additions include the 57-story Norwest Corp. tower and an adjacent 50-story skyscraper built by BCE Development and IDS Financial Services. Downtown Minneapolis office space has doubled since 1970 to 17.8 million sq. ft.—three times the size of downtown St. Paul's 5.9 million sq. ft. office market, located 10 miles to the east.

St. Paul's flagship Galtier Plaza development ran into financing problems after one 46-story tower was built, halting work on an adjacent 36-story scraper. Another major St. Paul project, the 37-story World Trade Center, is only 30% leased midway through construction.

Twin Cities population increased substantially in the green, hilly second-tier suburb cities of Apple Valley, Blaine, Brooklyn Park, Burnsville, Eden Prairie, Maple Grove, Plymouth and Shoreview. According to the Minnesota Planning Agency, the median 1984 family income in the 10-county metro area was $30,093, a 37% increase from 1979.

Unemployment in 1985 was 5.3% in a work force of 1.3 million people in the Twin Cities. Of that total, 116,000 work for the top 10 employers, headed by Honeywell with 21,700 employees. 3M Co., 18,617, and Control Data, 17,550, are close behind.

The city's corporate activities extend into its cultural life, supporting such fine arts institutions as Tyrone Guthrie Theater, the Minnesota Orchestra and St. Paul Chamber Orchestra.

Retail centers have sprung up around the Twin Cities, with Woodbury Center, an estimated 1.2 million sq. ft. retail mall east of St. Paul, the most recently announced project. Far larger than any other shopping center is the Mall of America, a giant 9.5 million sq. ft. development including retail, office, convention, restaurant and entertainment space, due to break ground in May, 1987.

In October, competition intensified between the *Minneapolis Star & Tribune* and the *St. Paul Pioneer Press & Dispatch* when the *Star & Tribune* opened a 12-employe bureau in downtown St. Paul. The dominant *Star & Tribune* (daily circulation 383,000) views the area as a single entity. Its new bureau will help it increase readership in the northeast, east and southeast Twin Cities area with bolstered community sections and more St. Paul news.

The *Pioneer Press & Dispatch* (daily circulation 190,000), takes a single-city approach, selling a few thousand copies each day in Minneapolis news stands. The *Star & Tribune* has a circulation of 35,000 in St. Paul territory.

Competition between business publications has pepped up, with MCP Inc., buying four business magazines from Edina, Minn.-based Dorn Communications for $4 million. MCP subsequently spiked one publication, the *Minnesota Business Journal*, and announced plans to publish its bi-weekly *CityBusiness Minneapolis-St.Paul* on a weekly basis within 18 months.

Machelek Publishing, Minneapolis, will debut in January the *Business Journal of Minnesota*, a "how-to" monthly magazine aimed at small and medium-size businesses. The *Minnesota Real Estate Journal* beat *CityBusiness* to the punch, becoming the first weekly business publication.

The Minnesota Legislature, after years of budget deficits and personal income tax surcharges in the early 1980s, cut corporate and personal income taxes $1.4 billion in the last two years.

Cable tv continued to struggle in Minneapolis, with Rogers Cablesystems wiring far fewer city households than it projected and, finally, asking the city for financial help. Continental Cablevision is wiring St. Paul.

The Twin Cities is served by five vhf and five uhf tv stations, with the CBS affiliate, WCCO-TV, leading the pack with a 6.8 rating, 27 share. United Television's indie, KMSP-TV, is one of the stronger uhfs in any market, at 3.1/12, according to A.C. Nielsen's May report. In radio ratings, WCCO-AM far outdistances other members of that market, which includes 15 am and 17 fm stations.

RANK **9**

Nassau-Suffolk, N.Y.

Little Plum

($ in thousands)

1985 vital statistics

Population	2,644,700
Disposable income	$42,926,596

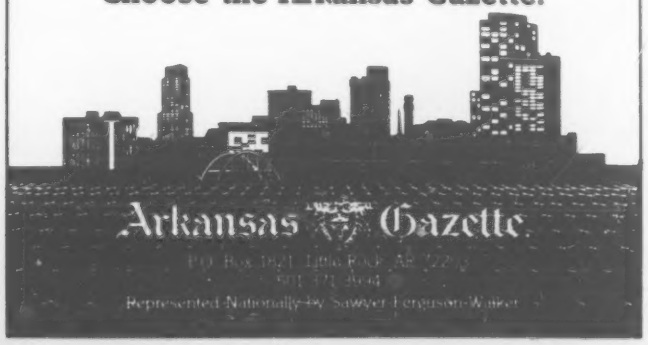
The numbers tell in brief what

Little Rock, Arkansas
A market profile.

		Little Rock Metro	% Gazette Coverage Daily	Sunday
TOTAL ADULTS		350,200	41%	53%
SEX	Male	163,700	41	55
	Female	186,600	40	51
AGE	18-24	56,700	36	51
	25-34	92,300	40	53
	35-44	67,600	38	47
	45-54	43,700	42	57
	55-64	40,700	46	62
	65 & Over	49,300	45	52
HOUSEHOLD INCOME	$20,000-$24,999	49,600	40	54
	$25,000-$34,999	76,600	39	58
	$35,000 & Over	84,200	58	66
	$50,000 & Over	39,800	63	68
EDUCATION	High School Graduate	130,200	37	48
	Part College	76,200	49	62
	College Graduate	48,500	64	73
MARITAL STATUS	Married	225,800	43	54
	Single	56,100	41	59
	Other	68,400	33	45
OCCUPATION	White Collar	145,600	51	61
	Blue Collar	61,700	27	45
	Other Employed	25,200	36	50
RACE	White	286,400	40	53
	Non-White	63,900	42	54
TENURE	Own	240,800	42	55
	Rent	109,500	37	49
TYPE OF DWELLING	Single Family Unit	257,500	42	55
	Multi-Family Unit	46,800	44	53

Source Simmons-Scarborough 1985 Newspaper Ratings Study
Copyright Simmons-Scarborough 1985 • All rights reserved

Make the right choice in Arkansas. Choose the Arkansas Gazette.



Arkansas Gazette

P.O. Box 1821, Little Rock, AR 72203
501-371-3664
Represented Nationally by Sawyer-Ferguson-Walker

"...and I'd like the stocks to have a P/E under 9, low debt not more than a quarter of capitalization, a return on equity of 15% and cash receivables at least equal to current liabilities..."

Our readers' assets and investments average $160,000.

50 plus

850 THIRD AVE • NEW YORK, NY 10022 • (212) 715-2781

makes Long Island's Nassau-Suffolk metro area a desirable place for marketers: No. 1 in the nation in media household effective buying income with about a $2,000 lead over a nearby rival in Connecticut; by Zip codes the nation's two wealthiest enclaves are Nassau County's Great Neck and Roslyn with after-tax incomes of $74,552 and $70,338, respectively.

But reaching the affluent and others of Long Island is tricky. The media scene in Nassau-Suffolk is heavily influenced by New York City print and electronic media. Times Mirror Co.'s *Newsday* has been the only daily based on Long Island. Skip Ackerman, president of Ackerman Advertising in Glen Head, says *Newsday* has 60% household penetration. That provides one buy for the market "but everybody else is in it. It's a daily catalog and it suffers from clutter."

The electronic side lacks such clarity. Long Island has 15-20 radio stations serving fragmented markets. On the other hand, it has no vhf stations, only public station WLIW-TV and a small uhf commercial station, WLIG-TV.

Nassau contains 64 incorporated villages and 68 unincorporated areas in three towns; Suffolk has 29 incorporated villages in nine towns. In the shadow of New York, they lack a common history or perspective.

Non-islanders also grope for a handle on the place. A survey by Elaine Sherman, professor at Hofstra University's School of Business, revealed that business people around the nation know more about Nassau-Suffolk's housing and traffic woes than its cultural and environmental attributes.

Those are, however, legitimate concerns. A spokeswoman for *Long Island Business*, a weekly publication which compiles the "Long Island Almanac," says traffic, taxes, utility rates and water supply are worrisome: "Companies have left because of electric rates and the lack of unskilled labor."

The economic scene in Nassau-Suffolk has developed a sort of Silicon Suburb of 2,000 hi-tech companies. A survey found the Island will add 17,000 engineering jobs by 1990, a 9.1% growth rate. Defense work done by companies like Grumman, Sperry, Fairchild and Republic account for 30% of the Island economic activity. The over-all unemployment rate in November, 1985, was 4%, down from 1983's 6.4%. The rate for fiscal 1986 was projected at 3.6% by the state department of labor.

Grumman Corp., Bethpage, an aerospace company, has the largest number of employes, 22,000. Next is the Roman Catholic Diocese of Rockville Centre, 12,500. New York Telephone, Sperry Corp. and Long Island Lighting Co. (LILCO) rounded out the top five, according to a survey by "LIA" Business' Research Bureau. The largest retailer, with 10 stores, was TSS-Seedmans.

According to Cushman & Wakefield of Long Island, in Garden City, the area had 2.1 million sq. ft. of new office space construction entering the market in 1985. The rental rate averaged $20.50 per sq. ft., with a 10% vacancy rate. Suffolk, the larger and less developed county, is experiencing the bulk of industrial project development. Figures from *Long Island Business* show that the eight largest projects under construction last year were all in Suffolk county, as were 41 of the top 50.

The area also has undergone a hotel boom. *Long Island Business* counted 15 proposals for expansions or new constructions last January, which it interprets as businesses looking for quality accommodations close to their locations.

The ethnic composition as of 1980 was 91.7% white, 6.2% black and 3.9% Hispanic. The Island is greying, as few families can afford housing there. That results in a lower school population. The state educaton department put actual public school enrollment at 432,400 for 1984-1985, falling to 391,700 for 1990-1991.

The Long Island lifestyle differs considerably from New York City's. Mr. Ackerman notes, "It's a lot more home oriented, with more home entertaining and activities." The typical home may have four or five tv sets, for example.

Out of the home, islanders have plenty of outdoors activities. The south shore of the island boasts Fire Island and other playgrounds of the rich and famous. The two counties have 20 state parks with 25,000 acres of space. Jones Beach and Robert Moses State Park and other beaches provide room for fun in the sun for islanders and city residents. Nassau-Suffolk have 1,600 miles of shoreline.

Mitchel Field in Uniondale has been developed as a culture and entertainment center for Nassau County, with the 18,000-seat Nassau Veterans Memorial Coliseum (home of the National Hockey League's Islanders) and its 60,000-sq. ft. exhibition hall. A 391-room Marriott hotel at the site is planning a 200-room expansion. The area also includes Nassau Community College and Hofstra University. To the north is Roosevelt Field, a major shopping center.

RANK
32

New Orleans, La.

Crescent City

($ in thousands)

1985 vital statistics

Population	1,324,400
Disposable income	$14,118,527

In 1986 Cajun cuisine was sweeping the nation, and everyone dreamed of crawfish and blackened red fish. Yet the city of New Orleans was preoccupied with a quagmire of a different sort: The Crescent City was bogged down in a stagnant economic environment stemming largely from continued recession in the oil and gas sector.

New Orleans laid off 1,200 city workers through October. The work week for the remaining 5,800 was reduced to four days at a 20% wage reduction for several months. City workers were to return to a five-day work week this month.

The city earlier this year slashed services and passed more than $6.5 million in new taxes to try to offset a $30 million deficit in the 1986 budget. Unemployment of 11.1% in the first quarter ranked fourth highest among the nation's 50 largest cities; in September it stood at 10.8%.

New Orleans' plight is part of a larger statewide problem. Having depended too much on the now-capped oil and gas gusher, Louisiana has led the nation in unemployment for some time. In June, the jobless rate in the Pelican State hit 13.8% for one of its highest counts, but slipped back to 12.5% by September. Such widespread economic woes have translated into reduced state aid for New Orleans.

The economic dilemma of the city got national attention with the bankrupt 1984 World's Fair, which collapsed with over $100 million in losses. Yet it has been said that New Orleans accepts disaster with equanimity. Indeed, the story of its present monetary misery is almost a tale of two cities: The financially crippled Crescent City is pressing forward through pivate investors, embarking on a citywide revitalization effort.

The Rouse Corp.'s Riverwalk, a $58 million festival marketplace, opened in August on a half-mile of riverfront in the International Pavilion of the World's Fair. The complex has 114 specialty shops and restaurants (half local, half national) with 35,000 sq. ft. of glass to showcase the Mississippi.

Less than half a mile away is another such marketplace, The Jackson Brewery, which doubled in size this fall to 140,000 sq. ft. with its Millhouse expansion. A drawing card is its French Quarter location—the historic brew-

house of Jax Beer, built in 1891 and now restored by the Jackson Brewery Development Corp.

Between these two is Canal Place, a Houston-style mall open since 1984; neighboring Jefferson Parish boasts two other large, new complexes—the Esplanade Mall, which welcomed Macy's this fall, and Galleria, a mixed-use development with phased openings over the next seven years.

The question is: Can New Orleans's sluggish economy support such intense expansion? Industry experts elsewhere predicted a bloodbath, but city economists say a strong tourism promotion could supply enough buyers to support the centers. Studies that showed 70% of the trade would come from tourism are proving accurate, but Riverwalk officials say repeat local business is picking up and tourists appear to be making the entire mall circuit. Tourism is New Orleans' No. 2 industry, with 1,073 conventions in 1985 and 768,753 delegates. Jackson Brewery reported 5 million visitors last year.

McGraw-Hill's "F.W. Dodge Reports" indicate construction activity topped $1 billion in 1985, up from $882 million in 1984. Nonresidential made up $578 million of the tally.

Other construction focuses on improving transportation, important to a metropolitan area that now faces very heavy freeway traffic with an average daily commute of 55.9 minutes. A second parallel span to the Greater New Orleans Bridge is to be completed by 1988, with an eventual 10 lanes instead of the present four. A riverfront streetcar line also is planned.

Meanwhile, the city's second black mayor in history, Sidney Barthelemy, continues to battle the financial crunch. Voters in September rejected by 61% a property tax that would have charged landowners $195 per lot. The city is considering another controversial tax that would assess 1.5% on earnings above $5,000 for all New Orleans workers, regardless of whether or not they live in the city.

The metropolitan statistical area of the New Orleans region actually consists of six parishes (counties): Orleans, Jefferson, St. Tammany, St. Bernard, St. Charles and St. John. The Economic Development Council also includes Plaquemines and St. James parishes in its over-all River Region picture. Population movement in recent years has been to outlying bedroom communities with St. Tammany Parish, for example, posting a 111.8% increase from 1970-84. Better quality of life and lower crime rates are cited as influencing factors.

The region's oil and gas industry—at $969 million—accounts for 3% of the nation's entire mining sector. Port-related activities are also strong, with the lower Mississippi River amassing 9% of the nation's total water transportation sector. Top private employer is Avondale Shipyards.

New Orleans is served by one daily newspaper, 12 am and 12 fm radio stations, seven tv stations and one cable company. WWL-TV (CBS), regarded as having the strongest local news slot, pulled a 10.8 rating, 32 share to lead nearest competitor, WDSU-TV (NBC), 7.5/22, according to A.C. Nielsen May reports. Arbitron gives radio station WYLD-FM a 15.5 share, outdistancing WEZB-FM with 10.1.

RANK **1**

New York

Big Apple

($ in thousands)

1985 vital statistics

Population	8,465,800
Disposable income	$116,792,146

The celebration last July of the Statue of Liberty's centennial was a typical New York City extravaganza—huge, hype-heavy, by turns solemn and silly, bold and crowded. The symbol in the harbor drew the attention of the nation to its largest city, as if it needed the scrutiny. News happenings in New York often have strong national repercussions because so many leading corporations call the Big Apple home.

It's big in every sense. New York ranks at the top in nine ADI categories, finishing second in passenger cars to Los Angeles. New York's households equal 7.7% of the U.S. total. Estimated population in 1985 was 8.5 million, up 2.3% from the 1980 census.

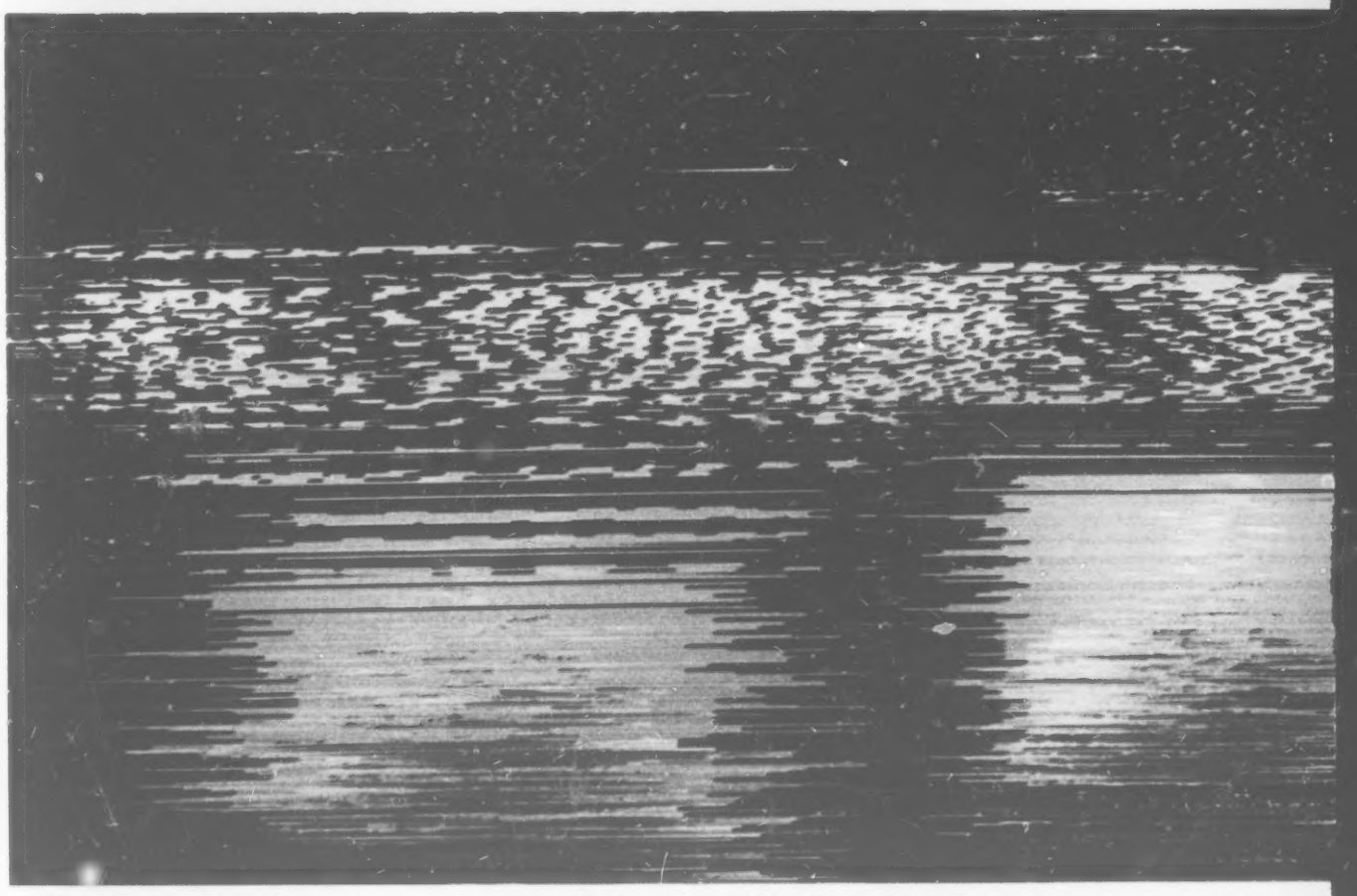
In that environment, national stories are often local events. The boardroom wars of the Big Three networks became a local story because ABC, CBS and NBC all have their headquarters within blocks of each other on Manhattan's West Side. WNBC leads the o&o stations in the rankings with 7.2 rating, 20 share, slightly ahead of WABC, 7/19, according to A.C. Nielsen's May report.

The turmoil of changing ownership affecting the networks—ABC bought by Capital Cities, NBC (RCA) by General Electric, and CBS falling to the control of Loews Corp.'s Laurence Tisch—also hit independent stations. Metromedia sold WNEW-TV to Rupert Murdoch's News America Publishing, which changed the call letters to WNYW-TV. Mr. Murdoch won a two-year waiver of FCC cross-ownership rules to give him time to find a buyer for the ailing *New York Post*. In May, News America sold the weekly *Village Voice* to Leonard Stern, head of Hartz Mountain Corp.

The action extended to the city's radio market. Capital Cities/ABC Inc.

AT&T

INSTANT C



A hot story takes shape at TIME® Magazine.

But at any moment an even hotter story can stop the presses.

TIME can move instantly to handle it.

And within 24 hours the new story is printed and ready for distribution.

All over the country.

AT&T helps make that possible.

An AT&T account team worked with TIME to develop a system designed specifically to meet their needs.

The system includes both AT&T SKYNET® Digital Service and AT&T ACCUNET® T1.5 Service.

Via AT&T satellite, SKYNET Digital Service transmits data, video, graphics and voice—anything that can be digitally encoded.

ACCUNET T1.5 Service sends digitally encoded signals by land.

Together they enable TIME to transmit a page with text and color to all their presses throughout the country in under a minute.

A full-color cover in less than two minutes.

In fact, the whole process, from closing to distribution, can take place in just 24 hours.

To give you an idea how our family of AT&T Digital Services work together to help TIME:

Using AT&T ACCUNET T1.5 Service, TIME sends a

© 1986 AT&T TIME® is a registered trademark of Time Inc

DATAFILES:
MEDIA

Top 35 prime time shows by networks' 30-second price

Rank	Show	30-sec. price	Network	Rating	Share
1	Cosby Show	$380,000	NBC	35.2	53
2	Family Ties	300,000	NBC	33.3	49
3	Cheers	230,000	NBC	29.6	42
4	Moonlighting	215,000	ABC	23.8	36
5	Who's the Boss	215,000	ABC	22.0	34
6	Night Court	206,000	NBC	25.2	38
7	Growing Pains	205,000	ABC	22.7	34
8	Miami Vice	195,000	NBC	17.4	28
9	Dynasty	185,000	ABC	17.4	27
10	Golden Girls	175,000	NBC	26.0	44
11	60 Minutes	161,000	CBS	23.6	37
12	Murder, She Wrote	156,000	CBS	26.1	38
13	Newhart	151,000	CBS	20.0	29
14	Designing Women	150,000	CBS	17.4	25
15	Hill Street Blues	148,000	NBC	16.9	29
16	Dallas	145,000	CBS	22.4	36
17	NBC Monday Night at the Movies	145,000	NBC	19.3	30
18	L.A. Law	139,000	NBC	15.6	27
19	NFL Monday Night Football	135,000	ABC	17.8	30
20	NBC Sunday Night at the Movies	134,000	NBC	18.4	30
21	Knots Landing	132,000	CBS	16.1	24
22	Valerie	132,000	NBC	15.5	23
23	ABC Sunday Night Movies	131,000	ABC	16.5	25
24	Amen	131,000	NBC	20.6	35
25	Hotel	130,000	ABC	15.2	26
26	Highway to Heaven	128,000	NBC	17.9	28
27	Jack & Mike	125,000	ABC	14.6	25
28	St. Elsewhere	125,000	NBC	14.3	25
29	Kate & Allie	122,000	CBS	18.5	28
30	227	120,000	NBC	19.4	33
31	Cagney & Lacey	120,000	CBS	16.0	26
32	CBS Sunday Night Movie	118,000	CBS	18.3	29
33	Amazing Stories	117,000	NBC	14.0	21
34	Perfect Strangers	116,000	ABC	16.3	26
35	Matlock	115,000	NBC	17.9	27

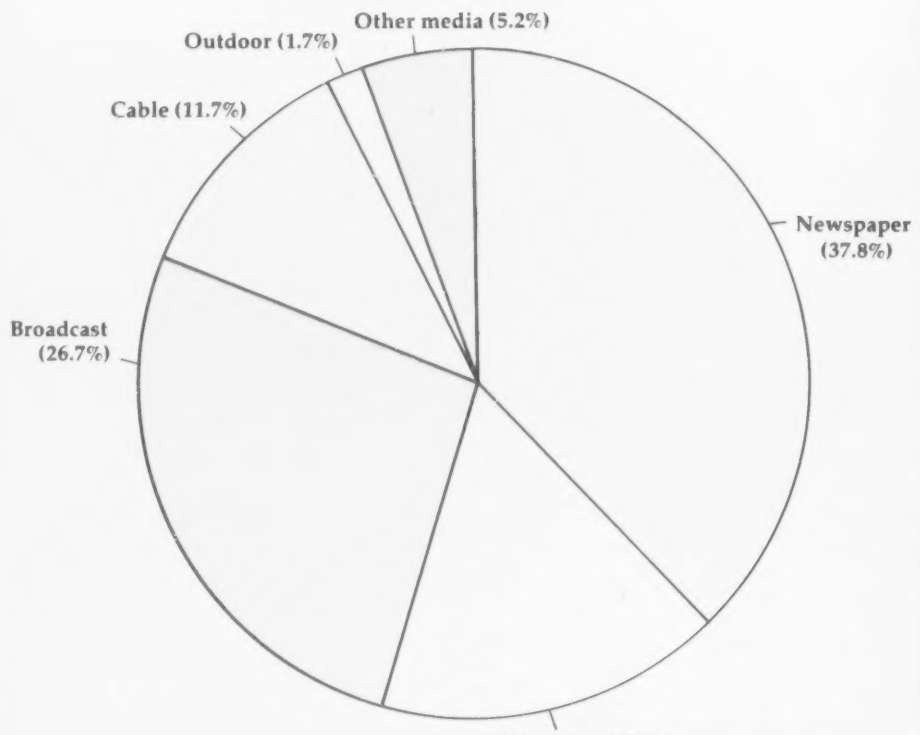
NOTE: Rating is % of all tv households watching the program; share is % of all viewing tv households. Figures given are season-to-date, Sept. 22 to Nov. 23.
Sources: 30-sec. prices from Advertising Age, Sept. 29, 1986; rating and share from A.C. Nielsen Co.

100 media cos. revenues

Media	Total revenues 1985	Total revenues 1984	% chng	Cos. with revenue 1985	Cos. with revenue 1984
Newspaper	$19,909	$18,110	9.9	52	51
Magazine	8,920	8,158	9.3	43	43
Broadcast	14,060	13,228	6.3	55	52
Cable	6,148	5,377	14.4	37	38
Outdoor	895	702	27.5	8	6
Other	2,736	2,210	23.8	10	10
Total	52,668	48,097	9.5	100	100

NOTE: Dollars in millions

Revenues by media as % of $52.7 billion



Leading print properties

Top 10 newspapers by daily circulation

Rank	Newspaper	Daily circulation	Parent company	Newspaper revenues
1	*Wall Street Journal*	1,952,283	Dow Jones & Co.	$844
2	*New York Daily News*	1,270,926	Tribune Co.	1,357
3	*USA Today*	1,179,052	Gannett Co.	1,680
4	*Los Angeles Times*	1,086,383	Times Mirror Co.	1,620
5	*New York Times*	1,001,694	New York Times Co.	1,109
6	*New York Post*	731,668	News America Corp.	435
7	*Washington Post*	748,019	Washington Post Co.	556
8	*Chicago Tribune*	744,969	Tribune Co.	1,357
9	*Detroit News*	680,800	Gannett Co.	1,680
10	*Detroit Free Press*	656,477	Knight-Ridder Newspapers	1,534

Top 10 magazines by circulation

Rank	Magazine	Frequency	Circulation	Revenues	Parent company	Mag. revs.
1	*Reader's Digest*	12X	17,300,101	$111	The Reader's Digest Assn.	$197
2	*Modern Maturity*	6X	13,597,330	26	Maturity Magazines Group	N/A
3	*National Geographic*	12X	10,690,714	32	National Geographic Society	220
4	*TV Guide*	weekly	8,685,907	314	Triangle Publications	648
5	*Better Homes & Gardens*	12X	8,012,035	123	Meredith Corp.	228
6	*Family Circle*	17X	6,553,883	146	New York Times Co.	217
7	*Woman's Day*	17X	5,631,835	107	CBS Inc.	385
8	*McCall's*	12X	5,275,428	81	McCall Publishing Co.	153
9	*Good Housekeeping*	12X	5,141,693	142	Hearst Corp.	569
10	*Time*	weekly	4,832,395	347	Time Inc.	1,482

NOTE: Newspaper and magazine revenues in millions.
Sources: Newspaper circulation from Audit Bureau of Circulations FAS-FAX averages for six months ended Sept. 30, 1986; magazine circulation from Audit Bureau of Circulations FAS-FAX averages for six months ended June 30, 1986. Individual 1985 magazine revenues are from Publishers Information Bureau. Parent company estimated revenues for total 1985 newspaper and magazine holdings taken from Advertising Age 100 leading media companies, June 30, 1986.

THE AVERAGE ANNUAL FAMILY INCOME OF DIARIO LAS AMERICAS READERS IS $28,050.

When it comes to reaching the people who buy what you're selling, Diario Las Américas readers have what it takes. A whopping 60.5% own their own home. More than 92% have one or more cars. They spend an average of $102.60 per week in the supermarket. And 77.8% have and use credit cards.

For complete information about the upscale Diario Las Américas audience, call Enrique J. Pérez, Advertising Director, and ask for your free copy of Diario's Reader Profile, conducted by Strategy Research Corporation.

Diario Las Américas

The Spanish-language Daily Newspaper
Founded July 4, 1953

Diario Las Américas
2900 N.W. 39th Street
Miami, Florida 33142 USA
(305) 633-3341

Represented nationally by
Cresmer, Woodward, O'Mara & Ormsbee, Inc. (CWOAO)

DATAFILES: AGENCIES

Top 10 agencies in magazine billings

Rank	Agency	Mag. billings 1985	Mag. billings 1984	U.S. billings 1985	U.S. billings 1984
1	Ogilvy Group	$368.8	$276.1	$1,694.5	$1,497.9
2	Doyle Dane Bernbach Group	300.4	233.3	1,099.4	981.7
3	Young & Rubicam	284.5	315.5	1,656.4	1,632.3
4	Bozell, Jacobs, Kenyon & Eckhardt	220.0	NA	1,100.0	935.2
5	Grey Advertising	207.7	175.9	1,221.9	1,034.6
6	J. Walter Thompson Co.	203.8	182.4	1,604.2	1,387.3
7	Foote, Cone & Belding	197.5	156.3	1,323.0	1,214.0
8	Leo Burnett Co.	190.5	181.3	1,269.9	1,132.9
9	BBDO International	180.1	221.5	1,296.1	1,109.7
10	N W Ayer	144.1	122.0	652.0	652.5

Top 10 agencies in newspaper billings

Rank	Agency	Newsp. billings 1985	Newsp. billings 1984	U.S. billings 1985	U.S. billings 1984
1	Foote, Cone & Belding	$213.2	$239.7	$1,323.0	$1,214.0
2	Bozell, Jacobs, Kenyon & Eckhardt	147.4	NA	1,100.0	935.2
3	Ogilvy Group	145.5	97.4	1,694.5	1,497.9
4	Young & Rubicam	133.1	138.0	1,656.4	1,632.3
5	J. Walter Thompson Co.	129.1	137.8	1,604.2	1,387.3
6	Doremus & Co.	121.3	119.1	173.2	152.7
7	Doyle Dane Bernbach Group	101.8	86.8	1,099.4	981.7
8	Grey Advertising	97.8	82.8	1,221.9	1,034.6
9	Leo Burnett Co.	88.9	90.6	1,269.9	1,132.9
10	Wells, Rich, Greene	76.1	80.3	633.8	618.0

Top 10 agencies in network tv billings

Rank	Agency	Net tv billings 1985	Net tv billings 1984	U.S. billings 1985	U.S. billings 1984
1	Ogilvy Group	$772.4	$880.5	$1,694.5	$1,497.9
2	Young & Rubicam	735.0	845.4	1,656.4	1,632.3
3	Leo Burnett Co.	647.7	555.1	1,269.9	1,132.9
4	Grey Advertising	623.2	496.6	1,221.9	1,034.6
5	D'Arcy Masius Benton & Bowles	570.5	624.8	1,202.6	1,359.8
6	J. Walter Thompson Co.	564.5	473.7	1,604.2	1,387.3
7	BBDO International	450.4	396.5	1,296.1	1,109.7
8	Ted Bates Worldwide	443.8	369.7	785.1	672.7
9	Foote, Cone & Belding	443.6	414.5	1,323.0	1,214.0
10	Dancer Fitzgerald Sample	307.7	280.6	861.9	750.2

Top 10 agencies in spot tv billings

Rank	Agency	Spot tv billings 1985	Spot tv billings 1984	U.S. billings 1985	U.S. billings 1984
1	Young & Rubicam	$478.8	$456.9	$1,656.4	$1,632.3
2	Foote, Cone & Belding	357.7	307.3	1,323.0	1,214.0
3	J. Walter Thompson Co.	343.6	297.0	1,604.2	1,387.3
4	D'Arcy Masius Benton & Bowles	316.3	383.4	1,202.6	1,359.8
5	Dancer Fitzgerald Sample	299.1	267.8	861.9	750.2
6	Ogilvy Group	280.7	241.8	1,694.5	1,497.9
7	Bozell, Jacobs, Kenyon & Eckhardt	275.0	NA	1,100.0	935.2
8	BBDO International	265.0	216.0	1,296.1	1,109.7
9	Doyle Dane Bernbach Group	226.5	197.5	1,099.4	981.7
10	Grey Advertising	213.8	206.9	1,221.9	1,034.6

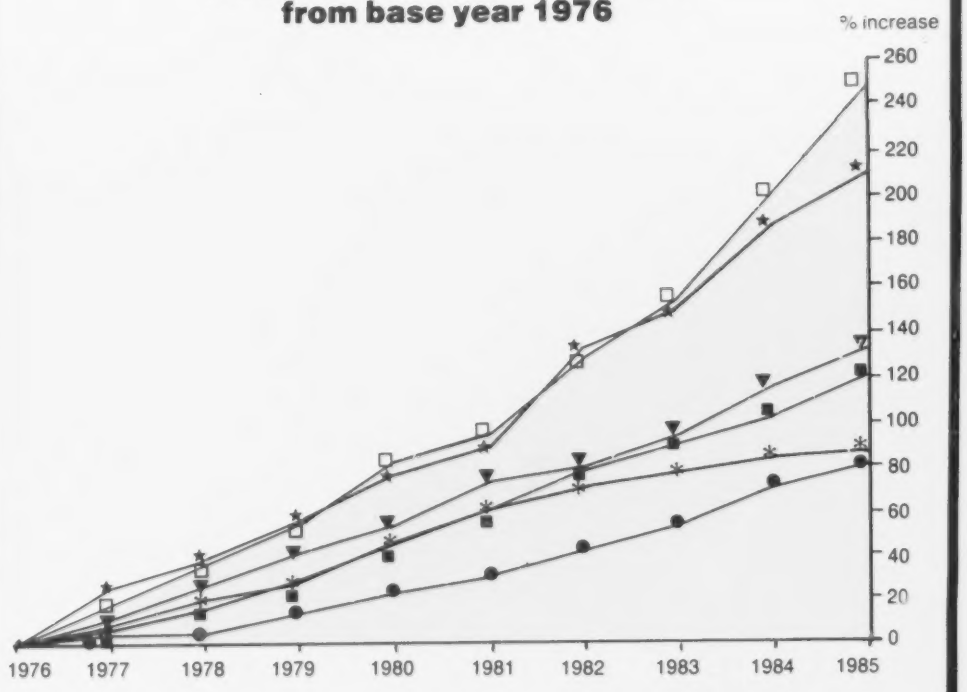
NOTE: Dollars in millions. Ranking taken from 92 of the top 100 agencies as published in Advertising Age, March 27, 1986. Billings of subsidiaries listed in that issue are not included in parent company totals here.

Top 10 U.S. agency super groups

Rank	Super group	Billings in 1985 Worldwide	Billings in 1985 U.S.
1	Saatchi & Saatchi Co. plc* (including Bates)	$7,632.4	$4,652.1
2	Omnicom**	5,016.9	3,743.1
3	Interpublic Group of Cos.***	4,827.9	2,351.9
4	JWT Group	3,817.4	2,365.8
5	Young & Rubicam †	3,575.3	2,272.0
6	Ogilvy Group	3,398.7	2,128.9
7	Foote, Cone & Belding Communications ††	2,191.6	1,721.6
8	D'Arcy Masius Benton & Bowles	2,181.3	1,333.1
9	Leo Burnett Co.	1,868.5	1,269.9
10	Grey Advertising	1,729.5	1,221.9

NOTE: Billings in millions. Super groups include agencies and agency holding companies, but the latter only if the primary business is advertising. Totals represent figures reported by agencies in the Agency Income Report, Advertising Age, March 27, 1986.
* Includes Saatchi & Saatchi Co. plc as comprised in 1985, Ted Bates Worldwide (including Kobe & Brady), Backer & Spielvogel and Dancer Fitzgerald Sample.
** Includes Ingalls & Associates bought by BBDO, (now Ingalls, Quinn & Johnson), but excludes Rubin Postner & Associates, the former Needham Los Angeles shop.
*** Includes Sieber McIntyre bought by McCann-Erickson, an IGC agency.
† Includes Fallon McElligott Rice (now Fallon McElligott) bought by Scali, McCabe, Sloves, an Ogilvy subsidiary.
†† Includes Leber Katz Partners.

Advertising Age 500 index from base year 1976



Top agencies' media billings as % of Ad Age 500

Media	Top 25 agencies U.S. billings 1985	Top 25 agencies U.S. billings 1984	Top 25 agencies % chng.	Top 25 agencies $ as % of top 500 U.S. billings 1985	Top 25 agencies $ as % of top 500 U.S. billings 1984	Top 100 agencies U.S. billings 1985	Top 100 agencies U.S. billings 1984	Top 100 agencies % chng.	Top 100 agencies $ as % of top 500 U.S. billings 1985	Top 100 agencies $ as % of top 500 U.S. billings 1984	Top 500 agencies U.S. billings 1985	Top 500 agencies U.S. billings 1984	Top 500 agencies % chng.
Newspapers	$1,659.2	$1,529.0	8.5	48.1	50.9	$2,243.7	$2,067.4	8.5	65.0	68.8	$3,451.8	$3,006.7	14.8
Business papers	225.6	210.2	7.3	24.8	26.1	336.8	306.7	9.8	37.1	38.2	908.2	804.0	13.0
Medical journals	131.9	87.1	51.4	32.2	28.0	136.0	87.1	56.1	33.2	28.0	409.5	311.6	31.4
Magazines	3,257.5	2,836.9	14.8	56.2	58.2	4,321.8	3,700.0	16.8	74.6	75.9	5,794.7	4,877.2	18.8
Supplements	132.5	96.2	37.8	59.8	52.3	161.7	128.0	26.3	72.9	69.6	221.7	183.9	20.6
Farm publications	66.0	64.6	2.1	40.9	41.0	71.2	66.8	6.6	44.1	42.3	161.5	157.8	2.3
Radio	1,193.9	948.5	25.9	46.4	46.9	1,641.2	1,294.7	26.8	63.8	64.0	2,572.2	2,022.6	27.2
Network tv	7,485.6	7,025.2	6.6	79.3	82.1	8,720.6	8,001.7	9.0	92.4	93.6	9,439.0	8,551.8	10.4
Spot tv	4,397.5	3,701.5	18.8	57.0	58.7	5,825.0	4,898.7	18.9	75.5	77.7	7,710.2	6,301.2	22.4
Cable tv	270.3	181.8	48.7	65.2	68.5	344.2	223.8	53.8	83.0	84.4	414.8	265.3	56.4
Transit advertising	8.0	12.0	(32.9)	12.4	20.8	35.2	39.6	(11.1)	54.4	68.8	64.7	57.5	12.5
Outdoor	443.1	464.9	(4.7)	56.6	62.4	584.2	600.7	(2.8)	74.6	80.6	783.3	745.7	5.0
Direct response*	825.9	507.0	62.9	39.6	38.3	1,197.7	734.5	63.1	57.5	55.5	2,084.3	1,323.3	57.5
Point of sale	57.8	26.7	116.8	31.8	19.8	81.7	58.7	39.1	45.0	43.6	181.5	134.6	34.8
Other	738.0	511.7	44.2	59.0	53.7	816.2	617.1	32.3	65.2	64.8	1,251.8	952.5	31.4
TOTALS	20,892.7	18,203.2	14.8	58.9	61.3	26,517.3	22,825.6	16.2	74.8	76.9	35,449.1	29,695.7	19.4

NOTE: Dollars in millions. *Direct response includes Yellow Pages, direct mail, catalogs, direct response tv, direct response radio, direct response newspaper, direct response magazine, telemarketing and freestanding inserts.

Consumer Magazine Ad Linage

Advertising pages for U.S., Canadian and foreign consumer publications

December

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
— Art & antiques —				
Art & Antiques	51.2	37.3	568.8	343.1
Southwest Art	85.7	92.7	892.9	1,031.3
Total Group	136.9	129.9	1,461.7	1,374.4
% change		+5.3%		+6.3%
— Auto/cycle/rec. vehicles —				
Autoweek (52X)	150.5	127.5	1,631.1	1,576.4
Car & Driver	77.1	89.7	—	—
Car Collector & Car Classics	22.8	15.5	208.7	217.0
Car Craft	57.4	69.0	875.8	907.8
Circle Track	48.3	45.3	716.9	626.3
Cycle	28.2	37.4	—	—
Cycle Guide (11X)	28.6	30.3	436.0	430.1
Cycle World	29.1	31.5	—	—
Dirt Rider	48.5	62.1	470.2	421.1
Dune Buggies & Hot VWs	75.3	95.3	1,028.4	1,130.6
Family Motor Coaching	129.3	121.4	1,716.0	1,723.8
4 Wheel & Off-Road	76.3	89.2	1,027.6	976.3
Hot Rod	39.4	50.6	728.7	747.2
Motorcyclist	16.5	16.0	496.4	426.1
Motor Trend	80.9	76.2	804.0	894.9
Motorhome	77.5	76.8	1,073.0	1,118.9
Rider	29.1	39.5	546.5	618.9
Road & Track	114.7	116.9	—	—
3 Wheeling	49.6	80.8	657.4	748.6
Trailer Life	86.3	91.3	1,300.4	1,418.1
Total Group	1,265.4	1,362.3	13,747.1	13,952.1
% change		−7.1%		−1.7%
— Boating & yachting —				
Boating	118.1	104.0	—	—
Chesapeake Bay	27.5	22.1	464.3	392.9
Cruising World	91.8	89.5	1,535.5	1,632.3
Lakeland Boating (10X)	57.0	54.0	686.1	645.0
Motor Boating & Sailing	119.7	117.0	1,961.3	1,930.3
Sail	69.3	79.0	1,310.1	1,499.2
Small Boat Journal(6X)	38.7	39.2	287.9	273.1
Trailer Boats(11X)	23.1	24.4	446.9	370.2
Western Boatman(6X)	31.0	33.1	226.3	266.9
Yachting	106.4	125.8	1,659.3	1,942.3
Total Group	682.5	688.0	8,577.7	8,952.2
% change		−0.8%		−4.2%
— Canadian —				
L'Actualite	94.4	100.8	1,027.0	857.1
Chatelaine				
English Edition A.	74.6	110.3	1,095.4	1,155.0
French Edition	72.5	96.8	947.6	952.2
City & Country Home(8X)	68.6	87.7	619.2	473.5
Flare A.	58.9	69.7	964.4	841.2
Harrowsmith-Canada	44.0	23.0	239.0	194.0
Macleans (52X) A.	98.4	151.4	1,563.2	1,547.2
Moneywise	47.4	33.9	438.3	420.1
Reader's Digest				
Canadian-English A.	65.8	77.3	812.1	896.3
Canadian-French A.	47.5	68.5	669.9	693.7
Total Group	672.1	819.4	8,376.1	8,030.3
% change		−18.0%		+4.3%
— Civic/fraternal —				
American Legion	17.1	14.6	290.8	300.4
Elks (10X)	—	—	187.9	194.2
Kiwanis	—	—	181.3	172.8
Lion (10X)	—	—	—	—
Rotarian	13.3	9.9	177.5	132.8
V.F.W. (11X)	19.8	15.2	304.8	294.8
Total Group	50.2	39.7	1,142.3	1,095.0
% change		+26.4%		+4.3%
— Comics —				
DC Comics	7.0	9.0	65.5	85.0
Marvel Comics Group	8.0	6.0	92.0	83.5
Total Group	15.0	15.0	157.5	168.5
% change		+0.0%		−6.5%
— General —				
American Health (10X)	48.7	56.2	614.4	559.0
American West (6X)	33.0	47.6	234.5	223.0
The Atlantic A.	34.3	55.5	458.8	578.9
Audubon Magazine (6X)	—	—	—	—
Bon Appetit A.	129.4	107.0	1,058.9	1,102.9
Changing Times	44.1	42.4	626.6	491.0
Connoisseur	72.7	87.2	881.7	838.2
Consumers Digest (8x)	23.3	13.8	173.2	216.0
Ebony	100.6	95.0	1,125.4	1,200.0
Fifty Plus	29.6	28.4	431.9	396.5
Food & Wine	89.2	77.2	688.3	630.7
Games	17.0	24.4	187.1	249.3
Gourmet	121.5	122.7	1,168.8	1,144.1
Harper's A.	21.4	20.9	268.8	300.8
Harrowsmith (6X)	45.9	—	245.2	—
Home Entertainment (8X)	—	—	—	—
Let's Live	42.0	36.0	587.0	489.0
Life	52.2	74.2	787.6	778.5
Modern Maturity (6X)	41.5	45.6	270.0	275.3
Money	145.2	126.8	1,490.0	1,459.8
Mother Earth News (6X)	53.3	38.0	312.6	267.7
Mother Jones (9X)	19.2	17.3	218.4	117.0
National Geographic	26.5	26.2	277.0	301.1
Natural History	34.8	36.3	484.8	511.8
Prevention	53.9	51.6	736.2	714.1
Psychology Today	25.9	24.6	342.3	304.6
Reader's Digest A.	121.4	109.6	1,178.6	982.4
Saturday Evening Post (9X)	29.5	39.9	336.2	333.5
Signature	71.8	50.8	863.5	681.7
Smithsonian	74.4	80.5	963.0	1,082.2
Sylvia Porter's Personal Finance (10X)	46.0	48.3	418.4	251.0
Town & Country	161.1	158.2	1,625.7	1,745.7
Travel-Holiday	40.5	24.0	513.4	507.5
Travel & Leisure	115.0	80.9	1,264.9	1,268.6
Vanity Fair	—	—	—	—
Writer's Digest	22.7	22.4	301.6	284.0
Yankee	72.7	65.5	931.7	959.1
Total Group	2,060.3	1,934.8	22,066.2	21,214.6
% change		+6.5%		+4.0%
— Home —				
Americana (6X)	—	—	—	—
Architectural Digest A.	139.2	117.5	1,559.1	1,571.7
Better Homes & Gardens	118.3	126.3	1,330.7	1,351.1
Colonial Homes (6X)	69.4	51.5	390.7	365.9
Columbus Monthly-Homes(4X)	—	—	105.4	47.1
Country Home (6X)	63.3	31.7	298.6	195.4
Country Journal	67.6	55.6	882.8	835.4
Dallas/Ft. Worth Home & Garden	72.2	89.6	918.7	1,010.5
Family Handyman (10X) A.	41.4	43.3	569.2	641.9
Flower & Garden (6X)	38.0	42.6	228.6	248.0
Home Mechanics	37.7	51.3	—	—
The Homeowner (10X)	18.1	16.9	300.3	282.4
Horticulture	33.4	34.7	432.5	403.0
House Beautiful	51.1	47.3	844.5	960.7
Houston Home & Garden	61.3	112.0	883.9	1,143.5
Metropolitan Home	46.2	54.9	679.1	770.5
1,001 Home Ideas	33.9	29.0	545.6	586.0
Phoenix Home/Garden	58.0	68.3	819.5	813.5
Practical Homeowner	—	—	467.7	498.3
Rodale's Organic Gardening	42.5	60.4	647.3	659.5
South Florida Home/Garden	30.8	30.0	381.1	462.4
Southern Accents (6X)	—	—	596.7	536.0
Southern Living	125.2	129.2	1,671.0	1,631.9
Sunset Magazine A.	116.9	127.9	1,620.6	1,747.8
Texas Homes	49.9	72.9	703.6	950.7
Workbench (6X)	—	56.0	279.6	320.7
The Workbasket	—	44.2	350.1	385.6
Total Group	1,314.4	1,493.2	17,506.8	18,419.5
% change		−12.0%		−5.0%
— Inflight & other passenger —				
Aboard Group (7)(6X)	—	—	—	—
Alaska Airlines	45.5	53.0	689.3	601.1
America West Airlines	51.6	—	347.1	—
American Way (24X)	77.8	74.9	1,220.1	1,245.3
East/West Network:				
Eastern Review	76.7	86.3	1,152.2	1,143.0
Northwest	34.5	40.2	547.7	510.5
PSA Magazine	79.2	77.7	1,105.1	1,024.5
Pan Am Clipper	38.7	51.2	523.2	727.2
Spirit	94.5	78.0	1,151.1	1,148.0
TWA Ambassador	56.5	—	165.0	—
United	84.8	72.7	1,142.8	1,124.6
Western's World	45.5	61.7	705.2	677.8
Halsey Publications:				
Air Cal	44.7	41.7	615.7	582.1
Delta Sky	61.3	65.2	897.8	884.3
US Air	41.5	39.5	552.2	614.7
Hawaii (6X)	25.7	20.8	328.5	275.5
Pace	64.9	79.8	982.3	857.3
Presidential Airways (6X)	6.8	—	52.0	—
Spirit of Aloha (6X)	26.4	20.3	328.4	272.5
Total Group	956.5	863.0	12,505.5	11,688.4
% change		+10.8%		+7.0%
— Men's —				
Esquire A.	156.3	220.3	1,247.2	1,400.7
Firehouse Magazine (13X)	40.2	46.7	542.1	589.3
Gentlemen's Quarterly A.	167.2	175.7	1,917.8	1,865.6
M Magazine	81.2	65.3	777.5	673.3
Penthouse A.	55.7	54.5	460.9	489.8
Playboy A.	72.5	103.6	732.2	894.3
Salute	25.8	—	142.4	—
Total Group	598.7	666.1	5,820.0	5,912.8
% change		−10.1%		−1.6%
— Metropolitan —				
Atlanta	72.5	97.7	659.6	709.0
Baltimore	118.2	121.4	1,000.3	1,024.6
Boston	216.7	216.6	1,961.8	1,949.5
California	69.9	93.8	825.6	855.0
Chicago	154.2	185.7	1,640.1	1,719.7
Chicago's North Shore	129.1	129.1	1,057.3	1,019.8
Cincinnati	67.7	789.2	61.1	745.2
Cleveland	101.6	107.4	884.9	991.0
Coast (39X)	61.4	63.3	2,453.1	2,680.6
Columbus Monthly	87.1	81.2	866.2	894.4
Connecticut	101.5	104.2	1,137.4	1,085.3
D/Magazine, Dallas/Ft. Worth	151.4	161.2	1,492.9	1,660.9
Denver	52.5	58.0	443.6	435.0
Detroit Monthly	94.1	137.4	985.8	935.2
Grand Rapids	36.8	38.9	513.4	597.0
Honolulu	69.7	80.6	792.7	782.1
Houston City	—	—	—	—
Louisiana Life (6X)	—	—	248.9	350.9
Madison	77.0	55.0	780.0	722.6
Metropolitan Detroit	91.0	70.3	932.5	873.0
Miami Mensual	47.8	60.0	542.5	497.2
Miami/South Florida	81.0	126.3	793.3	1,143.8
Mid Atlantic Country	—	—	—	—
Milwaukee	92.0	104.8	825.6	834.2
Minneapolis/St. Paul	123.1	132.8	1,228.9	1,263.9
Nashville	56.0	50.0	495.0	492.0
New England Monthly	59.4	40.4	500.8	423.9
New Jersey Monthly	76.6	64.8	960.8	753.3
New Mexico	—	—	—	—
Ohio	41.5	45.3	684.6	783.0
Oregon	—	—	—	—
Orlando	79.7	94.8	1,160.9	1,182.7
Palm Beach Life	107.3	120.8	768.3	892.0
Palm Springs Life	124.5	114.9	1,378.8	1,341.4
Philadelphia	175.2	172.8	1,667.5	1,641.2
Phoenix	97.3	113.9	1,162.3	1,188.5
Pittsburgh	75.2	62.0	821.7	781.9
St. Louis	79.3	72.0	638.6	679.8
San Diego	173.4	159.3	1,673.4	1,864.6
San Francisco (6X)	—	—	—	—
San Francisco Focus	121.2	129.6	1,181.0	1,150.2
Texas Monthly	146.8	149.8	1,496.5	1,562.6
Twin Cities	75.3	86.6	693.6	762.3
Ultra	—	—	—	—
The Virginian	—	—	367.8	324.0
Washington (7X)	40.0	58.0	475.5	252.5
Washington Dossier (11X)	—	—	—	—
The Washingtonian	164.0	188.5	1,867.9	1,979.8
Total Group	3,788.9	4,738.4	40,122.5	41,826.3
% change		−20.0%		−4.1%
— Movie/romance/radio/tv —				
Macfadden's Women's Group:				
Modern Romances	19.8	17.3	262.7	229.9
Secrets	19.8	17.3	262.7	229.9
True Confessions	19.8	17.3	262.7	229.9
True Experience	19.8	17.3	262.7	229.9
True Love	19.8	17.3	262.7	229.9
True Romance	19.8	17.3	262.7	229.9
Sterling Women's Group:				
Daytime TV	25.5	23.5	306.2	332.0
Modern Screen	14.5	15.5	93.7	89.3
Movie Mirror (6X)	14.5	10.0	33.0	97.0
Soap Opera Stars	14.5	16.5	93.1	110.1
TV Movie Screen (6X)	7.3	8.3	50.1	43.6
TV Picture Life (6X)	—	7.0	14.2	40.0
TV Game Show	—	—	—	—
Total Group	195.2	184.3	2,166.3	2,091.3
% change		+5.9%		+3.6%
— Music/entertainment —				
Audio	89.7	75.9	—	—
Dance Magazine	59.4	58.5	624.6	661.9
Musician	70.7	58.7	690.5	710.3
Playbill	55.0	65.8	560.3	616.5
Stereo Review	114.2	75.4	—	—
Video Magazine	111.5	115.0	951.1	932.4
Video Review	69.5	71.2	—	—
Total Group	570.0	520.4	2,826.6	2,921.1
% change		+9.5%		−3.2%
— National Sunday magazines —				
Parade (52X)	42.1	63.9	637.2	660.1
Total Group	42.1	63.9	637.2	660.1
% change		−34.1%		−3.5%
— Outdoor & sport —				
Alaska	46.0	49.4	526.1	532.2
The American Handgunner (6X)	48.0	36.0	229.0	221.0
American Hunter	17.6	11.6	254.1	241.2
American Rifleman	18.4	20.0	294.6	316.0
Backpacker (6X)	—	—	—	—
Bass Master (9X) A.	33.5	42.0	497.5	506.7
Bicycling (9X)	—	—	686.9	819.2
Ducks Unlimited (6X)	—	—	210.6	210.0
Field & Stream	57.0	77.0	1,061.5	1,052.0
Fins & Feathers A.	24.3	36.7	386.1	366.8
Florida Sportsman	93.8	99.1	1,249.5	1,159.8
Flying	40.4	37.3	481.9	548.7
Golf Digest	90.7	83.6	1,104.4	1,065.8
Golf Magazine	46.9	51.1	765.6	736.3
Guns	33.0	37.0	383.0	314.0
Guns & Ammo	48.7	39.6	608.1	552.7
In-Fisherman (6X)	66.5	41.0	474.5	488.0
Muscle & Fitness	115.3	110.0	1,326.4	1,282.7
Outdoor Life	48.8	62.0	902.1	846.5
Outside Magazine	52.4	50.6	592.6	531.0
Petersen's Hunting	51.2	43.9	650.1	573.5
Runner	30.5	29.2	356.7	428.7
Runner's World (13X)	29.0	28.1	368.4	448.5
Salt Water Sportsman	53.9	67.5	978.4	946.5
Sierra	—	—	—	—
Shooting Times	28.5	29.5	442.3	421.9
Ski (8X) A.	167.1	129.6	864.1	783.5
Skiing (7X) A.	150.0	170.1	893.6	959.2
Skin Diver	90.2	77.3	1,104.2	965.4

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. * All affiliated with Sunday Mag/Net. except Los Angeles Times Magazine and New York Times Magazine.

All figures represented in this chart are supplied by the magazines. Advertising Age makes no attempt to verify them and, therefore, is not responsible for inconsistencies or errors.

(Continued on Page 24)

(Continued from Page 23)

December

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
Southern Outdoors (9X)	—	—	386.7	322.7
Sport	—	—	—	—
Sports Afield	55.4	82.3	840.2	1,035.7
Tennis	56.3	52.9	838.9	958.6
Waterski (8X)	—	—	—	—
Western Outdoors (10X)	—	—	434.7	425.1
Total Group	**1,593.3**	**1,594.3**	**20,192.9**	**20,059.9**
% change		−0.1%		+0.7%
— Photography —				
American Photographer	40.5	57.2	467.9	510.7
Petersen's Photographic	31.5	33.7	315.6	353.2
Popular Photography	84.1	79.5	—	—
Total Group	**156.1**	**170.4**	**783.5**	**863.9**
% change		−8.4%		−9.3%
— Religious —				
Charisma	47.7	55.8	756.5	715.1
Christian Herald (11X)	25.5	28.7	306.37	347.2
Christian Life	32.8	—	258.7	—
Inside (4X)	85.0	78.3	363.8	329.8
Ministries Today (6X)	43.8	51.3	256.5	182.4
Moody Monthly (11X)	33.2	54.2	463.1	596.2
Total Group	**268.0**	**268.4**	**2,098.5**	**2,170.7**
% change		−0.1%		−3.3%
— Science/electronic/mechanic —				
Discover	49.3	34.0	434.9	417.2
Family Computing	89.5	55.4	591.4	489.2
Info World (52X)	156.0	98.0	1,712.0	1,616.0
Omni	76.3	75.5	726.8	728.1
Personal Computing	136.9	179.1	1,454.3	1,791.6
Popular Mechanics	74.8	90.2	1,085.7	1,155.9
Popular Science	53.8	70.8	794.7	793.4
Scientific American	44.8	43.2	436.4	566.6
Spectrum	69.9	83.5	983.5	1,242.4
Total Group	**751.2**	**729.8**	**8,219.6**	**8,800.5**
% change		+2.9%		−6.6%
— Woman/fashion/service —				
Bride's Magazine (6X) A.	304.4	246.1	2,095.3	1,819.6
Cosmopolitan A.	170.6	185.5	2,445.4	2,457.0
Essence	74.6	76.0	965.4	945.7
Family Circle (17X) A.	199.7	245.3	1,792.3	1,853.1
Family Magazine	53.6	37.2	743.8	476.8
Good Housekeeping A.	193.8	245.5	1,973.9	2,052.1
Harper's Bazaar	113.8	104.8	1,711.5	1,736.9
Health	32.9	36.2	479.5	471.4
Ladies' Home Journal	116.7	133.8	1,350.0	1,369.0
McCall's	115.9	121.5	1,148.7	1,155.5
Military Lifestyle	69.2	32.2	576.9	335.3
Modern Bride (6X)	242.5	233.8	1,794.2	1,711.6
New Woman	70.5	76.4	678.9	887.0
Parents Magazine A.	123.8	113.9	1,228.1	1,130.8
Redbook	116.7	129.1	1,193.3	1,166.5
Seventeen	81.0	77.0	1,376.5	1,437.7
Shape	68.6	65.6	860.5	753.4
Soap Opera Digest (26X)	22.6	30.0	243.2	326.7
'Teen Magazine	50.5	32.4	627.2	579.5
True Story A.	44.0	52.5	573.9	611.3
W Magazine	64.2	61.9	1,382.2	1,349.7
Weight Watchers	25.4	21.2	398.2	332.7
Working Mother	108.0	88.9	942.7	936.6
Working Woman	90.6	95.6	1,298.4	1,240.0
Total Group	**2,553.5**	**2,542.4**	**27,880.0**	**27,135.7**
% change		+0.4%		+2.7%
— Youth —				
Boys' Life	17.9	11.2	198.1	209.0
Campus Life (10X)	48.8	47.0	445.5	521.7
Total Group	**66.7**	**58.2**	**643.6**	**730.7**
% change		+14.6%		−11.9%

November

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
— Business/national —				
Barron's	221.8	237.1	2,101.0	2,113.5
Black Enterprise	63.2	49.5	792.2	749.2
Business Week (52X) A.	458.9	396.3	3,530.2	3,818.7
Dun's Business Month	49.9	62.2	514.3	550.1
Financial World (26X)	58.3	63.0	682.6	543.8
Forbes (26X)	340.9	374.2	3,048.9	3,315.5
Fortune (26X)	322.1	295.8	2,629.4	3,008.9
Frequent Flyer	67.2	75.9	672.6	706.9
Futures	46.2	48.5	551.5	562.5
High Technology	18.4	33.6	210.6	328.6
Inc. Magazine A.	103.1	129.6	937.2	1,037.7
Income Opportunities	74.6	51.9	610.1	481.4
Industry Week (25X) A.	141.4	113.3	1,090.1	1,016.1
Nation's Business A.	40.7	41.8	382.0	377.1
Savvy	51.3	32.3	375.7	352.6
Venture	86.4	92.9	782.6	814.9
Total Group	**2,144.3**	**2,097.7**	**18,910.8**	**19,777.4**
% change		+2.2%		−4.4%
— Business/regional —				
Advantage-Nashville's Bus. Monthly	80.0	68.0	710.0	565.0
Arizona Bus. Gazette (52X)	40.0	43.0	364.8	330.7
Austin Bus. Journal (52X)	25.7	58.2	451.5	644.3
Baltimore Bus. Journal	90.5	86.7	815.7	749.9
Boston Bus. Journal (52X)	135.4	153.7	1,469.4	1,577.5
Business Atlanta	63.1	70.2	751.7	751.3
Business First of Buffalo	55.7	57.7	637.8	713.0
Business First of Columbus	154.5	82.8	980.7	745.6
Business Journal-Milwaukee	168.1	157.8	1,225.2	1,260.1
Business Journal-Sacramento	55.0	36.0	519.0	492.0
Cincinnati Business Courier	94.5	72.4	898.6	722.1
Corporate Report Kansas City	26.5	39.8	301.8	496.7
Crain's Chicago Bus. (52X)	181.7	203.0	1,818.0	1,789.0
Crain's Cleveland Bus. (52X)	61.1	82.7	709.9	838.7
Crain's New York Bus. (52X)	35.4	44.6	394.4	237.2
Florida Trend (13X)	98.2	99.4	922.7	1,029.1
Georgia Trend	69.5	50.2	616.2	155.2
Grand Rapids Bus. Journal	36.2	27.7	393.4	212.9
Hawaii Business	49.6	46.0	519.9	541.8
Indianapolis Bus. Journal(52X)	147.8	131.3	1,654.9	1,369.1
Intercorp-Connecticut (26X)	81.0	68.0	937.0	643.0
Kansas City Bus. Journal	148.2	151.0	1,398.1	1,634.2
Los Angeles Bus. Journal	47.4	71.9	422.3	561.4
Manhattan Inc.	106.8	94.3	811.8	537.2
New England Bus. (20X) A.	133.9	101.8	945.2	1,032.5
Pacific Bus. News (52X)	121.9	118.4	1,294.6	1,237.8
Philadelphia Bus. Journal(52X)	168.4	111.7	1,365.5	1,099.6
Pittsburgh Bus. Times (52X)	98.9	69.7	1,096.8	863.3
Regardie's/Washington	136.8	126.6	1,529.7	1,377.9
San Diego Bus. Journal	50.3	43.3	402.0	376.0
South Florida Bus. Journal	98.1	109.2	1,182.3	1,016.4
St. Louis Bus. Journal (52X)	157.5	158.1	1,553.3	1,597.4
Texas Business	59.8	65.1	632.9	792.0
Total Group	**3,077.2**	**2,900.2**	**29,727.1**	**27,989.7**
% change		+6.1%		+6.2%
— National Sunday magazines —				
Parade (52X)	67.4	58.8	595.1	596.2
USA Weekend (52X)	58.4	81.9	555.9	616.4
Total Group	**125.8**	**140.7**	**1,151.0**	**1,212.6**
% change		−10.6%		−5.1%
— Newspaper Sunday magazines —				
Boston Globe	324.9	330.9	2,454.6	2,269.0
Chicago Tribune	142.9	193.1	1,037.0	1,380.2
Cleveland Plain Dealer	108.2	73.4	644.0	552.6
Columbus Dispatch	29.3	53.4	461.7	533.0
Detroit News	134.0	108.0	979.0	973.0
L.A. Times	79.0	135.2	756.4	884.5
Louisville Courier-Journal	78.9	132.1	713.8	849.2
Miami Herald	67.7	52.8	581.7	479.5
New York Times Magazine	492.2	441.7	3,778.9	4,068.3
Philadelphia Inquirer	252.8	250.8	940.8	712.7
San Francisco Image	134.3	124.1	808.8	961.6
Seattle Times	113.0	91.0	695.0	571.0
Toledo Blade Magazine	50.6	67.0	420.2	496.3
Washington Post	170.9	140.6	1,431.1	1,281.1
Total Group	**2,178.7**	**2,194.1**	**15,672.9**	**16,012.0**
% change		−0.7%		−2.1%
— Weeklies/bi-weeklies —				
The Advocate (26X)	132.0	142.2	1,471.6	1,176.4
Army Times Military Group:				
Air Force Times (52X)	219.7	195.7	2,012.0	1,777.0
Army Times (52X)	213.7	190.0	1,868.6	1,739.4
Navy Times (52X)	222.2	204.2	2,064.9	1,877.2
The Blood-Horse (52X)	461.8	636.0	4,138.7	4,819.9
Capper's Weekly (17X)	31.6	26.9	305.7	293.9
Commonweal (22X)	10.5	14.2	80.1	76.8
Golf World (43X)	42.5	46.9	866.2	784.4
Grit (52X) A.	35.9	21.6	282.6	222.9
National Journal (50X)	55.0	47.0	628.5	516.0
National Review (25X)	36.2	58.2	336.5	291.1
New Republic (48X)	49.5	47.4	401.2	359.8
New York Magazine (50X)	280.7	313.7	2,725.9	2,708.8
New Yorker	354.8	395.1	2,391.7	2,653.8
Newsweek (52X) A.	285.9	281.2	2,266.6	2,434.2
People (52X)	407.9	438.6	3,319.0	3,367.1
Rolling Stone (25X)	157.7	116.6	1,268.1	1,015.1
Sporting News (52X)	47.0	44.4	565.9	486.6
Sports Illustrated (52X) A.	286.1	289.6	2,451.4	2,535.4
Time (52X) A.	278.3	301.5	2,314.2	2,400.2
Travelhost (52X) C.	3,086.0	3,125.0	35,286.0	35,406.0
TV Guide (52X) A.	454.8	451.9	3,323.5	3,426.5
TV Update (52X) C.	2,795.0	2,636.0	26,165.0	25,495.0
Us Magazine (26X)	50.4	66.0	484.7	418.5
U.S. News & World Report (52X) A.	180.6	200.8	1,427.9	1,558.5
Total Group	**10,175.7**	**10,290.7**	**98,446.3**	**97,840.5**
% change		−1.1%		+0.6%
— Foreign —				
Business Week Int'l (52X)	150.4	243.4	1,454.6	1,507.6
De Armas Publications:				
Geomundo:				
Central America	7.0	9.0	47.0	59.5
Chile	7.0	6.0	52.0	58.5
Colombia	17.5	12.0	100.3	106.5
Ecuador	7.0	8.0	43.0	48.0
Mexico	22.5	19.5	110.7	103.5
Peru	4.0	5.0	34.0	53.5
Puerto Rico	4.0	5.0	32.5	34.0
U.S.	6.7	9.7	55.0	70.7
Venezuela	20.5	22.5	147.0	108.5
Hombre De Mundo:				
Central America	5.0	9.0	54.3	47.5
Chile	5.0	6.0	54.3	51.5
Colombia	20.7	25.5	162.7	113.0
Ecuador	4.0	7.0	46.3	47.0
Mexico	29.7	26.7	191.3	153.2
Peru	2.0	5.0	31.3	36.5
Puerto Rico	4.0	8.0	44.3	73.0
U.S.	11.7	11.7	110.3	100.0
Venezuela	45.5	40.8	226.3	243.8
Ideas Para Su Hogar:				
Chile	1.0	—	1.0	—
Colombia	31.0	26.5	144.2	178.2
Ecuador	6.0	6.0	27.0	59.0
Mexico	23.2	24.2	109.0	138.2
Peru	3.0	5.5	29.0	27.0
Puerto Rico	—	—	0.2	10.5
U.S.	4.0	8.0	47.0	65.0
Venezuela	13.8	41.5	100.5	204.8
Mecanica Popular:				
Argentina	5.0	1.7	52.3	18.0
Central America	13.5	10.5	101.8	103.8
Chile	6.3	4.3	51.7	35.8
Colombia	20.7	20.3	136.5	144.2
Mexico	22.7	20.0	146.7	174.2
Peru	14.2	11.5	115.8	121.7
Puerto Rico	10.5	10.0	78.0	99.3
U.S.	7.3	9.0	65.0	80.5
Venezuela	20.3	16.7	136.5	144.2
Vanidades Continental:				
Central America	47.3	33.8	219.7	115.8
Chile	9.7	4.3	50.3	34.7
Colombia	155.2	137.2	954.5	840.2
Ecuador	26.8	32.3	214.0	242.8
Mexico	154.2	172.7	930.2	1,051.2
Peru	32.7	26.7	152.5	191.0
Puerto Rico	35.2	52.8	353.0	399.5
U.S.	46.0	56.0	487.0	447.0
Venezuela	89.2	99.8	473.2	604.2
Hearst International Publications:				
Buenhogar:				
Central America	3.0	3.0	16.0	10.0
Chile	4.0	1.0	17.0	10.0
Colombia	53.8	53.7	378.2	374.7
Ecuador	17.0	17.0	128.0	178.0
Mexico	56.3	89.7	391.3	556.2
Peru	21.0	15.0	96.5	123.0
Puerto Rico	6.5	6.0	99.0	97.5
U.S.	13.7	22.3	213.8	195.3
Venezuela	41.3	47.2	252.3	380.3
Cosmopolitan en Espanol:				
Central America	13.3	5.3	60.0	19.2
Colombia	42.8	24.5	204.2	164.2
Ecuador	1.0	1.0	3.0	5.0
Mexico	76.8	87.7	487.5	561.8
Peru	1.0	2.0	2.0	27.0
Puerto Rico	16.3	35.5	120.7	244.0
U.S.(Spanish language)	18.0	26.8	266.7	206.2
Venezuela	34.3	53.3	181.3	283.0
Cosmopolitan Foreign Editions:				
Australia	114.9	107.4	775.2	767.4
Brazil	136.3	71.4	650.1	513.1
China	70.5	55.2	380.1	350.4
France	143.5	117.7	933.8	1,079.7
Germany	184.0	158.7	1,251.9	1,121.0
Great Britain	182.0	179.0	1,230.7	1,337.0
Greece	60.0	48.0	589.4	567.4
Holland	125.0	102.0	819.3	746.3
Italy	89.5	91.5	639.5	559.6
Japan	57.7	57.3	403.8	407.3
South Africa	120.0	110.0	974.0	970.0
Good Housekeeping Foreign Editions:				
Australia	65.4	47.4	371.5	590.6
Great Britain	203.8	204.4	1,451.5	1,469.5
Johnston International:				
Alam Attijarat	58.8	57.0	391.2	512.7
Far East Business	43.1	64.3	427.6	361.0
Modern Africa (6X)	13.0	25.3	115.7	88.8
Latin America Finance (6X)	18.8	18.3	112.0	70.0
Newsweek International A.:				
Atlantic (52X)	125.0	131.1	919.5	983.3
Latin America (52X)	65.8	79.9	637.0	699.8
Pacific (52X)	33.9	40.3	329.0	318.0
Progreso (9X)	11.6	6.3	83.2	103.3
Reader's Digest:				
Arabic	7.5	10.5	75.0	112.0
Asian	184.0	262.0	2,283.8	2,349.5
Australian	61.3	70.5	599.1	624.5
Belgian-Flemish	146.0	151.5	816.9	913.5
Belgian-French	80.0	85.0	489.6	565.0
British	65.2	62.0	530.9	513.3
Chinese B.	85.5	120.0	1,096.8	1,369.0
Danish	24.3	32.3	332.6	349.1
Dutch	45.0	51.5	426.4	442.5
Finnish	61.8	30.0	445.9	462.7
French	25.5	31.9	173.6	440.4
German	100.5	99.5	709.2	725.7
Iberian	3.0	4.5	20.0	37.5
Indian-English	86.0	112.5	865.0	992.0
Indian-Hindi	15.5	15.5	115.0	124.0
Italian	52.5	56.0	440.5	375.0
Korean	25.0	39.3	310.5	282.8
Latin American:				
Argentina	19.0	8.5	152.5	189.5
Brazil	—	4.5	20.0	48.5
Central American	6.0	5.5	72.0	94.0
Chile	8.0	13.0	114.0	118.0
Colombia	41.0	37.5	278.5	304.0
Ecuador	6.0	5.5	67.0	92.0
Mexico	77.7	63.5	657.3	537.7
Peru	6.0	8.5	78.0	105.5
Puerto Rico	4.0	1.5	49.5	50.5
U.P.B.	9.0	5.5	71.0	78.5
U.S. Spanish	9.5	14.5	169.0	110.5
Venezuela	4.0	7.0	104.5	111.0
New Zealand	63.5	85.0	591.8	636.5
Norwegian	13.0	13.0	86.0	198.8
Portugal	49.9	56.5	400.2	414.6
South African	95.5	112.0	881.5	1,009.5
Swedish	24.0	28.5	173.5	201.5
Swiss-French	41.0	39.0	241.0	288.6
Swiss-German	46.0	48.0	312.8	398.1
Time International:				
Time-Asia	82.0	106.4	760.7	941.8
Time-Atlantic	142.1	146.6	1,066.9	1,168.0
Time-Canada	246.8	325.5	1,963.1	1,985.4
Time-Latin America	47.1	63.8	474.0	511.7
Time-South Pacific	146.9	168.7	1,053.2	1,299.3
Visao (52X)	189.3	184.8	1,598.0	1,539.9
Vision/Latin America(24X) A.	39.7	36.2	313.4	301.4
Total Group	**6,001.2**	**6,398.2**	**46,057.2**	**49,011.5**
% change		−6.2%		−6.0%